ISCTE Business School
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DIGITAL MARKETING PLAN FOR THE PORTUGUESE FAMILY BUSINESSES ASSOCIATION

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Abstract

The organizations that stand out focus on marketing techniques adapted to the trends and their reality. In the third sector, the lack of resources and the need for notoriety become an increasing challenge.

The purpose of this project is to develop a digital marketing plan for the Portuguese Family Businesses Association to meet its real needs as a nonprofit organization.

The Association's communication strategy is still centred on the most traditional means of marketing, leaving the digital world and all its potential untapped.

Social networks are an excellent tool in pursuing the Association's objectives as an organization that needs: external support, highlight the contribution of Family Businesses in the national economy and expands its number of associated companies broadening its knowledge spectrum.

The plan consists of choosing a digital strategy that incorporates the use and management of each of the social media channel essential to the objectives expressed by the Association. The plan contains several suggestions, including account creation on some social media channels, and exemplifies with mock-ups the best way to produce both visual and written content.

Therefore, intensive research was done into the internal and external factors that influence the Association and its activity through the collection of several sources of information. The ideas mentioned here are adapted to the reality of the Association but can serve as an example for other nonprofit organizations looking to dive into the digital world.

Key Words: Digital Marketing, Nonprofit Organizations, Family Businesses, Social Media.

JEL Classification: M31 – Marketing; L31 – Nonprofit Institutions.

Resumo

As organizações que se destacam focam-se em técnicas de marketing adaptadas às tendências e à sua realidade. No terceiro setor, a falta de recursos e a necessidade de notoriedade torna-se um desafio crescente.

O objetivo deste projeto é desenvolver um plano de marketing digital para a Associação das Empresas Familiares de forma a responder às suas necessidades reais enquanto organização sem fins lucrativos.

A estratégia de comunicação da Associação encontra-se ainda centrada nos meios mais tradicionais do marketing, deixando o meio digital e todas as suas potencialidades por explorar.

As redes sociais são uma excelente ferramenta na prossecução dos objetivos da Associação enquanto organização que precisa de: apoio externo, salientar o contributo das Empresas Familiares na economia nacional e expandir o número de empresas associadas alargando o seu espectro de conhecimento.

O plano consiste na escolha de uma estratégia digital que incorpora o modo de utilização e gestão de cada uma das redes sociais essenciais aos objetivos manifestados pela Associação. O plano contempla diversas sugestões, incluindo a criação de contas em algumas redes sociais, e exemplifica com maquetes a melhor forma de produzir conteúdo quer visual quer escrito.

Desta forma, foi feita uma pesquisa intensiva aos fatores internos e externos que influenciam a Associação e a sua atividade através da recolha de várias fontes de informação. As ideias aqui mencionadas estão adaptadas à realidade da Associação, mas podem servir de exemplo para outras organizações sem fins lucrativos que pretendam mergulhar no mundo digital.

Palavras-chave: Marketing Digital, Organizações sem fins lucrativos, Empresas Familiares, Redes Sociais.

Classificação JEL: M31 – Marketing; L31 – Nonprofit Institutions.

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The master's thesis was an amazing journey in the development of my learning process. I learned to work closely with an organization, and this enabled me to grow not only at a professional level, with the professional relationships I had to develop and sustain throughout the project, as well at a personal level when there were challenges that forced me to leave my comfort zone and think of creative solutions.

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Thank you from the bottom of my heart.

"*The change it's not a threat. It's an opportunity.*"

Seth Godin

Executive Summary

This master thesis is a project for a nonprofit organization, the Portuguese Family Businesses Association, and starts with a clear explanation of the problem and the several inherent costs involved for the organization with the development of the project.

The project consists of the development of a digital marketing plan for the Association. To theoretically support and understand the ideas suggested in the project, it is necessary to expose some theories defended by recognized authors.

The literature review comprises the importance of the Family Businesses in the national economy, their distinctive characteristics and the future challenges they will have to surpass. As this is a marketing plan for a nonprofit organization it is also important to understand these concepts separately (namely marketing and nonprofit organizations), their evolution, the main practices and the needs to improve their activity when conjugated. Also, a deep look is given on how to develop a marketing plan, step by step.

Moreover, the concept of branding and its application in Family Businesses is explained. This topic is covered to serve as an example that these companies influence the way the Association communicates. It follows that these companies do not have solid digital marketing and communication strategies, so it is necessary to reinvent them in order to make them more updated concerning the trends. It is also noted that Family Businesses are considered to be more socially responsible and incorporate a Corporate Social Responsibility strategy into their business plans, which can be an advantage when developing actions for the marketing plan.

Then emerges the specification of the concepts of digital marketing, blended marketing and what integrates digital communication. It is shown here that there must be a fusion between offline and online marketing tools. The steps to be considered for a social media plan are explained and policy for using them is also defined.

All these theories and concepts are summarized in the conceptual framework by the names of their authors.

The next chapter explains the methodology selected for the project. The research purpose is about doing a deep immersion in the organization to absorb everything about it, so it's descriptive research. The approach is qualitative to better understand the

employees and the day to day situations. Therefore, the project follows a deductive approach as it is based on existing information.

The data sample is a mix of information involving the Association's name which can be retrieved from different types of sources. Besides the fieldwork during the internship of the researcher, the data extracted from the Association is divided into two stages: first Primary data, composed by direct observation, related with the internship period, and by semi-structured interviews, gathering the visions and opinions of the Association’s employees, and then Secondary data, with content analysis to perceive the Association’s image and reputation. It is important to highlight that content analysis focused on the digital platforms in which the Association is present.

Data analysis comprises the realization of a SWOT analysis and a strategic Benchmark to provide valuable insights for the elaboration of the plan. The analysis of the interviews followed the method proposed by the author Gioia, which deals with interviews from an engagement perspective.

Before moving on to the plan, it is necessary to clarify what the Portuguese Family Businesses Association is and what it does, outlining its mission, vision, values, vectors of activity, services, presence on social networks and other relevant information for the preparation of the project.

The digital marketing plan begins with the organization's classification and its target public. A table with the Unique Value Proposition of the Association is also elaborated and the SWOT and Benchmarking analyses are conceived. The plan also includes the communication strategy and related actions for 2019 attending to the objectives expressed by the Association.

The online communication manual created includes the brand concept, the tone of voice in the communication, the way images and videos are used and, the focus of the project, the digital marketing tools, composed mainly by social networks, which are extended with the explanation of the practices of the Influencer Marketing and the example of an online communication for a large Association event (the *20 Years Congress - Family Businesses 4.0*). The manual contains tips for using each social media channel and its example is materialized on a mock-up (present in the appendices).

The next chapter reveals the findings of work done over the past six months. This includes quantitative data with *Key Performance Indicators* and qualitative data from the interviews with Association employees that prove the effectiveness of the digital marketing plan.

Finally, the last two chapters explain the contribution to the Association's activity and what were the limitations of the project.

Table of Contents

Abstract..ii

Resumo..iii

Acknowledgments..iv

Executive Summary..vi

Table of Contents..ix

List of Figures..xiii

Glossary..xvi

1. Problem Context 17

1.1 Problem Statement.. 17

1.2 Problem Relevance 18

2. Literature Review 19

2.1 Family Businesses Overview 19

2.1.1 Definition.. 19

2.1.2 Three-Circle Model 20

2.1.3 Characterization.. 22

2.1.4 Family Businesses in Portugal.. 26

2.1.5 Future Challenges 27

2.2 Marketing 29

2.2.1 Marketing Definition 29

2.3 Nonprofit Organizations 31

2.3.1 Nonprofit Organization Definition 31

2.4 Marketing in Nonprofit Organizations 34

2.4.1 Partnership with the Private Sector 36

2.4.1.1 Social Alliances and Cause-Related Marketing 37

2.5. Strategic Marketing Planning Process 37

2.5.1 Mission statement, Objectives, Specific Goals and Values 38

2.5.2 Situation Analysis.. 39

2.5.2.1 SWOT.. 39

2.5.2.2 STEEPLE 39

2.5.2.3 Publics 39

2.5.2.4 Competitors 41

2.5.3 Strategy... 41

2.5.3.1 Goal formulation 41

2.5.3.2 Strategy formulation.. 41

2.5.4 Tactics... 45

2.5.4.1 Marketing of people... 47

2.5.5 Implementation Control.. 50

2.6 Branding 51

2.6.1 Brand Equity.. 52

2.6.2 Branding in Family Businesses 53

2.6.2.1 Communication 53

2.6.2.2 Corporate Social Responsibility.. 55

2.7. Digital Marketing 57

2.7.1 Blended Marketing 57

2.7.2 Digital Communication 57

2.7.3 Social Media.. 58

2.7.4 Social Media Action Plan.. 60

2.7.5 Definition of a policy for social networks 62

2.8 Conceptual Framework 63

3. Methodology.. 72

3.1 Research purpose... 72

3.2 Research approach... 73

3.2.1 Data Sample 74

3.2.2 Data Collection 74

3.2.3 Data Analysis 76

4. Portuguese Family Businesses Association (AEF) 77

4.1 Profile 77

4.1.1 Mission 78

4.1.2 Vision 78

4.1.3 Values 78

4.2 Structure 78

4.2.1 Governing Bodies 79

4.3 Activity 79

4.3.1 Next in Line Group 81

4.4 Services 82

4.5 Channels of disseminating the activities 83

4.6 Social Media Presence 83

4.7 Future Issues 83

5. AEF's Digital Marketing Plan 84

5.1 Classification and Target Public 84

5.2 Unique Value Proposition 84

5.3 SWOT Analysis 85

5.4 Benchmarking 86

5.5 Strategic Communication Plan for 2019 88

5.6 Online Communication Manual 90

5.6.1 Introduction 90

5.6.2 Concept and Brand 90

5.6.3 Communication 91

5.6.4 Voice Tone and Signature 92

5.6.5 Image and Videos 93

5.7 How to Communicate Online 93

5.7.1 Digital Marketing Tools 94

5.7.1.1 Influencer Marketing 104

5.7.1.2 Event Online Communication 105

6. Project Conclusions 106

6.1 Key Performance Indicators (KPIs) 107

6.2 Interviews 108

7. Project Contribution 112

8. Project Limitations 113

9. Bibliography 115

10. Appendices 120

List of Figures

Figure 1. The Three Circle-Model of Family Business System (Adapted from Tagiuri and Davis, 1982).

Figure 2. The Bivalent Attributes of the Family Firm (Adapted from Tagiuri and Davis, 1996).

Figure 3. The priorities of Family Businesses for the next two years (Adapted from a KPMG study, 2018).

Figure 4. The categorization of nonprofit organizations (Adapted from Lovelock and Weinberg, 1984).

Figure 5. The exchange relations of the Mutual Benefit Association type (Adapted from Kotler, 1975).

Figure 6. The SWOT Matrix (Adapted from Ferrel et al., 2011).

Figure 7. The Readiness diagram (Adapted from Kotler and Keller, 2009).

Figure 8. The Targeting strategies (Adapted from Kotler and Armstrong, 2012).

Figure 9. The Matrix Benefits versus Price (Adapted from Kotler and Armstrong, 2013).

Figure 10. The Online Integration Model to Promote Behaviour Change (Adapted from Andreasen & Kotler, 2003).

Figure 11. The Three roles that structure the brand policy (Adapted from Baynast et al., 2018).

Figure 12. The Brand Equity five categories and value provided to the customers and to the firm (Adapted from Aaker, 1991).

Figure 13. The dimensions involved in the Brand Equity construction (Adapted from Keller, 2013).

Figure 14. The most popular social networks (Own elaboration).

Figure 15. The phases of the digital plan (Adapted from NPSource, 2017).

Figure 16. The Conceptual Framework (Own elaboration).

Figure 17. The Areas of Activity of AEF (Adapted from AEF's Website, 2018).

Figure 18. The Activity vectors of AEF (Adapted from one of AEF's Presentations).

Figure 19. The Positioning Framework of AEF (Own elaboration).

Figure 20. The SWOT Analysis of AEF (Own elaboration).

Figure 21. The Benchmarking (Own elaboration).

Figure 22. The Communication flow (Own elaboration).

Figure 23. The Portuguese Family Businesses Association Logo (Adapted from AEF's Website).

Figure 24. The *Copy* for a post example (Own elaboration).

Figure 25. The *Copy* for a post example (Own elaboration).

Figure 26. The example of an Image for a post with the model to follow (Own elaboration).

Figure 27. The example of a Video for the YouTube channel with the AEF's Logo (Own elaboration).

Figure 28. The homepage overview of the old AEF's Website (Adapted from AEF's old website).

Figure 29. The homepage overview of the new AEF's Website (Adapted from AEF's new website).

Figure 30. The proposal for the Organogram of the New Website (Own elaboration).

Figure 31. The Facebook Page of AEF (Adapted from AEF's Facebook).

Figure 32. The Post Example on Facebook (Own elaboration).

Figure 33. The Company Page of AEF on LinkedIn (Adapted from AEF's LinkedIn).

Figure 34. The Post Example on LinkedIn (Own elaboration).

Figure 35. The Twitter Account of AEF (Adapted from AEF's Twitter).

Figure 36. The Instagram Account of AEF (Adapted from AEF's Instagram).

Figure 37. The Stories Examples on Instagram (Own elaboration).

Figure 38. The YouTube Channel of AEF (Adapted from AEF’s YouTube).

Figure 39. The example of a Post with an Influencer (Own elaboration).

Figure 40. The profile photo of all social networks during the Congress (Own elaboration).

Figure 41. The micro-site for the 2018 Family Businesses Congress (Adapted from Family Businesses Congress Website).

Figure 42. The Facebook Event (Own elaboration).

Figure 43. The speaker disclosure Post (Own elaboration).

Figure 44. The speakers’ panel Post (Own elaboration).

Figure 45. The Facebook Live Interview with Speakers (Adapted from AEF’s Facebook).

Figure 46. The 2018 Congress Best Moments Video (Adapted from AEF’s YouTube Channel).

Figure 47. The acknowledgment Post (Own elaboration).

Figure 48. The growth of the number of Likes and Followers on Facebook (Adapted from AEF’s Facebook Statistics).

Figure 49. The statistics of the Event on Facebook (Adapted from AEF’s Facebook).

Figure 50. The Post of the President’s Interview for Expresso (Adapted from Expresso’s Facebook).

Figure 51. The structure of the Data from Interviews (Own elaboration).

Glossary

AEF – Associação das Empresas Familiares (Portuguese Family Businesses Association)

Apps – Mobile Applications

FAQs – Frequently Asked Questions

KPIs – Key Performance Indicators

NIL – Next in Line

NPOs – Nonprofit Organizations

UVP – Unique Value Proposition

1. Problem Context

1.1 Problem Statement

Family businesses, businesses held and managed by a family, are considered the predominant form of enterprises worldwide. International studies indicate this type of businesses as the baseline of the economy and the engine of world development. In Portugal, they assume a crucial role and are vital for the economy.

Due to their specific needs and characteristics, in each country around the world, at least in all Europe, there is an entity, in the form of an organization or association, responsible for representing and defending the rights of these companies. In some countries they are relevant and can impact government laws, in others they need to be more elaborated and adapted to their reality.

In Portugal, the **Portuguese Family Businesses Association** (AEF) is the legal entity responsible for the representation, defence and providence of a range of services for the national family businesses. The Association supports family businesses improve their management, broaden their universe of knowledge and prepare them for the changing environment of modern society.

As a nonprofit organization, the Association find increasingly complex challenges in outlining strategies, is confronted with intensive competition for prominence and, consequently, seeks funding to fulfil its mission (Dolnicar & Lazarevski, 2009).

Nonprofit organizations have poorly exploited and managed business opportunities, notably the digital presence materialized in the social media channels. With the endless chances that the Internet entails, they can reach their audiences more easily and attract more funds and new customers. This reality is experienced in the AEF diminishing its potential. The Association is not present in certain social networks and does not have a digital strategy outlined.

The necessity of a reinvention process to follow the changes triggered by the constant innovation was stated by the Association’s direction. However, there is lack of specialised know-how in Digital Marketing and Communication area. Currently, this is done by outsourcing. They are subcontracting a communication agency which is quite far away of their fundamental issues.

Furthermore, at an internal level, they are pursuing with antique marketing and communication procedures and techniques, leaving aside a whole new form of communicating the business.

One of their goals is to gain more associates and attract new partners, but the low expression of their image in the market (perceptions of future associates) and in the media (public opinion), can make them lose good opportunities. Because economic resources are scarce and as we live in the digital age, social networking can be a route to take to achieve the intended objectives stated in the strategic plan.

Hereupon, the business problem that arises is the absence of adequate and consistent digital strategy. Therefore, the purpose of the thesis is the development, and application, of a **digital marketing plan for the Association**. The digital process must be distinctive to highlight the brand and catapult it to another level of recognition and relationship with stakeholders.

1.2 Problem Relevance

In a world full of economics and social pressures, the contribution of the Association needs to be clear and indispensable for every stakeholder. The challenges brought by the technological sector are an opportunity for the organization to grow.

The preparation to deal with these issues is inner connected with the Association's essence as a brand. The brand is the privileged vehicle in the transmission of the mission, core values and, raised to another level, the culture of any organization.

The Association is crossing a structural phase where gaining more notoriety is a primordial goal. More than ever, it needs to have a well-defined digital strategy to gain visibility in the market, differentiate from other similar associations and, therefore, improve their performance. This is the path for the Association achieve the establish goals and fulfil its mission.

If the Association were deciding to maintain the things as they are, it can face a set of costs that can generate some sort of stagnation in their purpose.

At an economic level, it may lose potential associates and the current ones will rethink if it is worth to pay the fees.

A social cost is the unfamiliarity with the organization because there isn’t any representation of the Association in the media and people won’t recognize or talk about them, so the public opinion is inexistent.

In the political sphere, they won’t able to influence the public policies, conduct some *lobbying*, since there is a lack of relevance surrounding the Association due to what was mentioned before.

2. Literature Review

2.1 Family Businesses Overview

Family businesses are the oldest and dominant form of organizations. Estimations pointed between 65% and 80% of all businesses in the world as family businesses. This type of businesses assumes particularities and is exposed to several challenges (Gersick et al., 1997).

In these companies, a family has control in terms of naming the management and some of its members work and participate in the company. The relationship between family and company gives the company special characteristics in which economic and family spheres are merged (Ussman, 1996).

Therefore, exist an overlap between family, business and property, which give them specific characteristics that make them unique. They are represented in all sectors of activity, assume different sizes and impact the economy. In Europe, most SMEs (Small and Medium-sized Enterprises) are family businesses and a large majority of family companies are SMEs (European Commission, 2009). For Portugal, family firms assume a crucial role not only in the economy, but also in providing a strong commitment to the local communities.

2.1.1 Definition

Due to the peculiarities of these companies, the concept of family business is not consensual in the scientific findings. Although, the group of experts seconded by the European Commission (2009) has officialised four criteria for an organization to be considered familiar, based on the three-dimensional family business model (the family, the business and ownership): decision-making power, effective influence, governance and 25% participation. The full definition agreed and proposed by the group includes the following:

"*A firm, of any size, is a family business, if:*

1) The majority of decision-making rights is in the possession of the natural person(s) who established the firm, or in the possession of the natural person(s) who has/have acquired the share capital of the firm, or in the possession of their spouses, parents, child or children's direct heirs.

2) The majority of decision-making rights are indirect or direct.

3) At least one representative of the family or kin is formally involved in the governance of the firm.

4) Listed companies meet the definition of family enterprise if the person who established or acquired the firm (share capital) or their families or descendants possess 25 per cent of the decision-making rights mandated by their share capital." (European Commission, 2009: 10)

The group recommends incorporating it at a national level to contribute to producing quantitative and comparable information about the family business sector at a European level (European Commission, 2009).

Litz (1995) *cit. in* Hernández-Linares et al. (2018) stated two integrated conceptual approaches to the definition of Family Businesses: "(*1) a structure-based one considering family involvement in firm ownership and management, and (2) an intention-based one looking at values and preferences.*" (Hernández-Linares et al. 2018: 932).

Chua et al. (1999) *cit. in* Hernández-Linares et al. (2018) contributes by adding one more variable to the definition. Family Businesses varies in terms of: "*(1) ownership-management dimension, (2) family ownership and/or control, and (3) forms of ownership.*" (Hernández-Linares et al. 2018: 932).

Abridging, the general concept of family business always includes any business in which the bulk of the ownership or control lies in a family and the family representatives identify and perceive it as a family-owned business.

2.1.2 Three-Circle Model

The three-circle model describes the family business system as three independents but overlapping subsystems: business, ownership, and family. "*Anyone in a family business* *can be placed in one of the seven sectors formed by the overlapping circles of subsystems*" (Gersick et al., 1997: 6).

Elaborated from the point of view of systems theory, this model intends to outline the forces or subsystems that are related within the family enterprise (Ussman, 1996).

In the **circle of ownership**, the owners have regarded the company as an investment from which they expect to receive profits. In the **family circle**, people have effectively viewed the company as a key element of family identity and a source of financial security, a heritage for the second generation currently embedded in the organizational context. In the **business circle** (please see Figure 1), the founding members have their professional careers linked to the company and have argued that it should generate profits, grow and ensure, if possible, all the jobs of those who work there (Coelho, 2002).

It is a very useful tool for understanding the source of interpersonal conflicts, role dilemmas, priorities and limits in family businesses. Specifying different roles and subsystems helps break down the complex interactions within a family business and makes it easy to see what's really happening, and why. For example, family quarrels over dividend policy or succession planning become understandable in a new way if the position of each participant in the model of the three circles is considered (Gersick et al., 1997).

This is a system organized around relationships with an emotional charge. Relationships more than professionals, are emotional and deal with family ties that can be either positive or destructive (Ussman, 1996).

The challenge of managing a family business lies in knowing how to negotiate the relationships established between subsystems (Ussman, 1996).

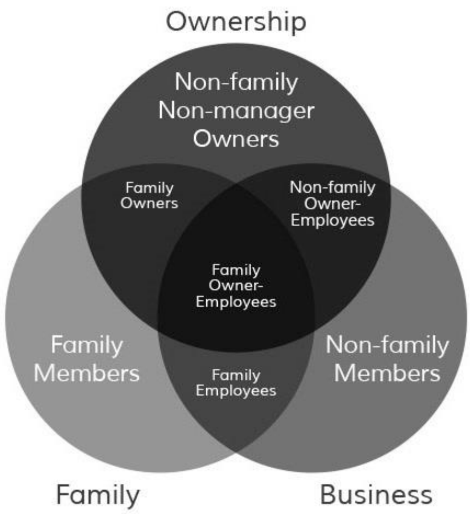

Figure 1. The Three Circle-Model of Family Business System (Adapted from Tagiuri and Davis, 1982).

2.1.3 Characterization

Over the years, stereotypes have been created about the family business, such as they are little professionalized, filled with nepotism, small, too traditional, suffering from that of the family that owns it (Ussman, 1996).

Moreover, they are "*often portrayed as competing in mature, low-innovation markets, many do operate in turbulent and competitive sectors that demand significant innovation in products, markets, and processes*." (Miller et al., 2015: 22) The salient traits can be the family-centric, parochial and conservative preferences. (Miller et al., 2015).

Businesses are life projects of a founder who personifies corporate and family values. Its footprint leaves a feeling of belonging, of pride in collaborating on a common project and the passion for the indispensable ingredients to guarantee a sustainable future of the company (Vilanova, 2018).

In this subject, Chua et. al. (1999) defends that a Family Business is a company managed on the grounds of a certain business vision which is shared by the same family members or by a small number of families pursuing to maximize its sustainability throughout several generations.

To the authors Cabrera-Suárez et al. (2001) the strategic importance of the knowledge transmission in the Family Business is crucial for competitive advantages gains and developments. Thus, play an important role in the succession process. To succeed, successors should acquire communication, leadership and management skills that allow them to exercise influence within the company.

New technologies, like the social networks, reinforce communication cohesion and family ties. Its image and reputation are amplified, and its collaborators become, in addition to the founder, ambassadors of the company and of the respective brands (Vilanova, 2018).

Tagiuri and Davis (1996) demarcated attributes that are organizational features of these firms and account for both strengths and weaknesses. Thus, the authors analyse the advantages and disadvantages of each feature and call them *bivalent attributes*. They are: the simultaneous roles, the shared identity, the lifelong common history, the emotional involvement and ambivalence, the private language, the mutual awareness and privacy, and meaning of the family company.

The overlapping of roles in family companies causes serious doubts about whose oversees decisions because family members working in the family firm can have **Simultaneous Roles**: as relatives, as owners or as managers. At first glance, they are concerned about family welfare and only after about the business, which can origin conflicts about the authority and each responsibilities of members and generates risks in the sustainability of the company. "*Family considerations can easily intrude on business decisions, and vice versa.*" (Tagiuri and Davis, 1996: 202).

Following the first attribute, the **Shared Identity** is related to the fact that "*relatives who work together share a sense of identity.*" (Tagiuri and Davis, 1996: 202). For example, the name of the family carries a weight and a reputation that is transversal to the employees of the company and to the very existence of the family. This identity acquires a meaning to people inside and outside the family. In some cases, it becomes a successful stamp, in others it can destroy a reputation and image.

Being part of a family there is inherently an associated life history. "*Out of this common history emerges a considerable amount of shared experience, even though each family member has his or her own recollections of that experienc*e." (Tagiuri and Davis, 1996: 203). The **Lifelong Common History** allows each relative to take history and make it an advantage or a disadvantage, either at the family level with the strengthening of ties or at the corporate level with some past decisions or stories to unveil.

Throughout this story, it is evident that the relatives share feelings, be they positive or negative, with each other. It is almost impossible not to take family issues into the professional plan, which triggers a different **Emotional Involvement** within companies.

Relatives' relationships have the peculiarity of communicating through a language that can only be decoded through family members. This **Private Language** includes "*special words, phrases, expressions, and body movements evolve that have agreed upon meanings.*" (Tagiuri and Davis, 1996: 205).

Family members enjoy a special **Mutual Awareness and Privacy**, as they can perceive the circumstances of their relative, such as "*what they are under, what makes them happy or angry, how they are feeling physically, and so on.*" (Tagiuri and Davis, 1996: 205). Although this attribute involves enormous support among the relatives, exposing emotions and driving certain behaviours can make family members more vulnerable and this can affect business decisions.

The **Meaning of belonging to the Family Business** emphasizes the relationships within the family since they are part of a major work created with his name. This unites them for the same goals, contributing to the development of the business (please see Figure 2).

Disadvantages (-)	*Attribute*	*Advantages (+)*
Norm confusion and anxiety. Family business and ownership issues can get mixed up. Lack of business objectivity.	Simultaneous Roles	Heightened family and company loyalty. Quick and effective decision-making.
A stifling sense of being overwatched. Resentment toward family and business	Shared Identity	Heightened family and company loyalty. A strong sense of mission. More objective business decisions.
Family members can point out weaknesses. Early disappoint-ments can reduce trust in work interactions	Lifelong Common History	Relatives can draw out relatives' strengths and complement their weak-nesses. A strong foundation can encourage a family to weather adversity.
Lack of objectivity in communi-cation. Resent-ment and guilt can complicate work interactions. Covert hostility can appear.	Emotional Involvement and Ambivalence	Expression of positive feelings creates loyalty and promotes trust.
Can trigger sensitive reactions that can distort communication and encourage conditions for conflict.	Private Language	Allows for more efficient communication with greater privacy.
Can lead relatives to feel overwatched and trapped.	Mutual Awareness and Privacy	Improved communication and business decisions that support the business, owners, and family.
Fierce rivalries can develop between relatives	Meaning of the Family Company	Company symbolism can develop a strong sense of mission for employees.

Figure 2. The Bivalent Attributes of the Family Firm (Adapted from Tagiuri and Davis, 1996).

Ussman (1996) points out some inherent characteristics of the family business: dependence on the founder, a strong connection to the founder's values, which makes the company as an extension of itself; the presence of the "sons" in the company; the conflicts inherent to relations within the company; loyalty among family members; identification with a family (the family name is often the name of the company); oriented for the long term, an inheritance to last through generations.

Additionally, Coimbra (2008) detailed that family businesses present special behaviour characteristics, such as: focus on long term strategies rather than on quarterly or annual results; more aversion to risk and in taking debt than the average firm; more inclination to reinvest (or "plough back") the profits; adoption of mechanisms to protect family assets (e.g.: agreements to resolve family disputes – the *Family Protocol* – and to avoid that such disputes are passed from the family system to the business system and vice-versa; creation of shelters to avoid confiscatory taxation); proper development and training of the family members most suited to continue the business; planning of the critical transition periods, such as hiring family members into the business, delegating executive power and carrying out the succession of the business; it is frequent that two firms with similar family ownership characteristics and doing business in the same supply chain tend to cultivate long-lasting supplier/customer relationships based on inter-family trust. Sometimes this interfamily trust also translates into marriages between members of the families.

On the other hand, there are some characteristics, present in the documents of the European Commission (2009) and Coimbra (2008), which determine the success of this type of organizations: recognition by the perception of continuity and have a more balanced management between the short and long term; presentation of a strong commitment between family and business; natural incubators of an entrepreneurial culture; drivers for the next generation of entrepreneurs; recognition for the maintenance of personal relationships, reliable and lasting, with the stakeholders – market, banks, customers, suppliers, employees and the community in which they operate; recognized for continuity of knowledge, reliability and importance of reputation; flexibility and agility in decision making and ability to deal with negative cycles; ability to transmit strong family values to business; recognized as modern and innovative companies, as generators of stability for society and for producing wealth and employment.

According to Coelho (2002), a large part of family businesses has already experienced the following typical situations:

- Internationalization – usually started in the second decade of the company's life;
- The "triple" coincidence of diverse circumstances – some examples include: business maturity, declining managerial capabilities of the organization, and changing the security needs and status of homeowners and their families;
- The changes in the relationships of key stakeholders – which have occurred between the owners, the family members and the staff working in the company.

2.1.4 Family Businesses in Portugal

In Portugal, the Family Firm Institute estimates 70% to 80% of all businesses are family-own and they contribute around 65% for the Gross Domestic Product and are responsible for 50% of the workforce (Family Firm Institute, 2018).

Currently, family businesses are a disregarded topic in Portugal. Family businesses are synonymous of "*outdated, small, unprofessionally managed firm*" (Coimbra, 2008: 1). Most of the references in media have pejorative connotations related to the wealth of the families.

Today, there seems to be an improvement in the opinions and perceptions of these companies, highlighting the crucial role for the development of the economy and helping people through job creation and promotion of the regions. However, there is no official legislative or legal protection for these firms in the country.

This sector is characterised by a considerable heterogeneity. Family businesses exist in all sizes and are present in all industries and branches. Most of the Portuguese SMEs correspond to a family business and the image on the Portuguese public of a private Portuguese owned medium-sized or large company has the subjacent idea of a family business (Coimbra, 2008).

Following this data and information, family enterprises are the key part of the Portuguese productive fabric. Therefore, their contribution is undoubtedly important for the country progression even if one is not aware of it.

2.1.5 Future Challenges

Family businesses, like any other type of business, face serious challenges. Despite strong economic indicators, the challenges are inevitable for any business. Family businesses signal concerns in important areas.

Following the European Commission (2009) and Coimbra (2008) insights, in the list of priorities of the family companies this are the most common and current challenges, essential to ensure a sustainable evolution of the business:

- Professionalize management – transition to a formal and judicious management style that improves the chances of success of the company. Family members should also be professionalized to make them more capable of conducting business in a professional, competent and capable manner, thereby ensuring a smooth and successful perpetuation for future generations (Pimentel, 2019);
- Developing an effective, modern and transparent *Corporate Governance* model;

- Creation of a succession plan – preparation of the next generation under the need to adequately prepare and plan succession to ensure the survival and sustainability of these companies (Pimentel, 2019).

In this highly globalized and digital Era, companies face challenges that can both leverage and prevent innovation. A barometer conducted by KPMG Enterprise (2018) presents some factors that influence the concerns of the companies: intensification of the talent dispute, for highly qualified human capital; labour costs continue to rise; political uncertainty and expansion delayed with the Brexit situation; regulatory environment to create complexity, with the introduction of General Data Protection Regulation (GDPR).

Having clarified the concerns, it is necessary to look to the future and set as the main priorities. The same barometer (KPMG Enterprise, 2018) points out the main priorities for the next two years (please see Figure 3).

A major challenge in today’s world is to make our economies and business models more sustainable and fully committed to the needs of stakeholders and future generations. Family businesses, thanks to their traditional values, such as long-term vision or deep community and social roots, hold a privileged position to lead this process and put the spotlight into the challenging duties of corporate citizenship and **corporate social responsibility** (EFB, 2019).

Certain types of enterprise, such as cooperatives, mutual, and family-owned businesses, have ownership and governance structures that can be especially conducive to responsible business conduct. By utilising their experience and expertise, family businesses can assist the European Institutions in formulating a regulatory environment that is conducive to long-term sustainable business practices (EFB, 2019).

The **digitization** process is an accelerating opportunity for family business, that lack a fully developed **digital strategy**. The new technologies changes how business runs and the interaction with others. For instance, digital can enhance customer engagement, finding new ways to get close to them (Deloitte, 2018).

A Deloitte study (2018) found out that only a quarter of next-generation of family business leaders had strategy for the use of digital technologies in place, while another

35% said that they had one but that is was relatively recent. Almost 40% did not have a digital strategy or said that they were still working on it.

Many business leaders see digitization mainly as an operational improvement play without fully considering its other potential applications. Family business should explore areas like innovation, the development of new models and talent, for example using digital platforms (Deloitte, 2018).

Leaders should spread digital awareness to the rest of the family. They need to educate family members about the value of digital technology. In the future, companies must embody new information systems and digital methods to improve their performance and leverage the position of being traditional toward a digital future (Deloitte, 2018).

As the literature suggests, there is some resistance to change which translates into a lack of innovation in the development of sustainable and adapted to reality marketing strategies, specifically in the digital marketing field. An opportunity to explore by the marketers and the future generations of family firms.

2.2 Marketing

2.2.1 Marketing Definition

Every organization seeks to accomplish their purpose in society. To succeed, businesses need to able to respond the social needs, in the sense of what people want or expect from its existence.

Kotler (1975) refers three essential processes for organizations existence: the attraction of enough resources, the conversion of these resources into products, services, and ideas, and the distribution of these outputs to various consuming publics.

However, the outputs must become recognised and desirable in citizen's life. This is the stage where Marketing takes place. For Kotler (1975), Marketing is an **integrative process based on exchanges** that can assume two different complementary approaches:

- Managerial process – a technical approach which involves an analysis of the market, the planning of products and services, implementation of the price, distribution and communication decisions, and control and evaluation of the strategy, oriented to generate profit through sales;
- Social process – related to the identification and satisfaction of society's needs and desires, typically a contribution for society improvement.

The American Marketing Association (AMA) synthetizes and clarify the concept as "*the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large."* (AMA, 2013).

Despite the several ways it can be defined for not being a "hard science", Marketing complies with some elementary priorities stated by Dibb (2001): satisfying customers; identifying/maximising marketing opportunities; targeting the "right" customers; facilitating exchange relationships; staying ahead in dynamic environments; endeavouring to beat or pre-empt competitors; utilising resources/assets effectively; increasing market share; enhancing profitability.

Moreover, Kotler and Keller (2009) stands for the importance of managing this activity and bring out the designation of *Marketing Management* as the art of getting, keeping and growing customers from a specific target market and deliver them superior customer value. The value creation usually follows an integrated marketing perspective, where every action is aligned with each other and is designed and implemented under the scope of the organizational strategy. The strategy is materialized into a marketing plan shaped to meet stakeholder's expectations.

Every organization must follow three basic sequential steps when approaching marketing as a business activity: first convey an *analysis* of the market to know the customers, competitors and trends, then design a *strategy* align with the goals of the company to meet customers' requirements, lastly create *programmes* for implementation based on what was previously stated (Dibb et al., 2001).

Marketing has gained significant importance over the past years, being the only activity in the business totally focused on people, bridging the company and the final consumer. The providence of unique experiences to consumers with the products or services offered that improve quality of life, enable organizations to gain consumer knowledge, indispensable to improve business performance, generate financial benefit and, when the strategy is well-orchestrated, gain a competitive advantage over its rivals (Dibb et al., 2001).

Nowadays, social networks have brought to the fore a new way of communicating and a series of challenges that organizations must face. The consumer has become more demanding, informed and, above all, has gained power in building the image and reputation of an organization. In this way, it is an active stakeholder in the process of asserting an organization and in the case of nonprofit organizations can even be decisive.

2.3 Nonprofit Organizations

Nonprofit organizations (NPOs), like other organizations, assume different structures and purposes. The essential element of NPOs is the **voluntary action**. People chase common goals that are not forced to support and don't withdraw any remuneration from their action (Connors, 1980).

Salamon and Anheier (1992) emphasize the distinction between the private nonprofit sector and philanthropy. The first one, as the name indicates, is a "*set of private organisations providing a wide variety of information, advocacy and services*" (Salamon and Anheier, 1992: 130). On the other hand, philanthropy is the givenness of assets and time for public purposes. Nevertheless, the two are interconnected by the fact philanthropy constitute one of the main forms of financing the organizations in the nonprofit sector.

2.3.1 Nonprofit Organization Definition

Concerning the diversity and richness of this type of organizations, Anheier (2005) purposes four different approaches in the establishment of a concrete definition:

- *The legal definition* – Depending on the country's laws and regulations, the organization must be eligible under the civil law to proof its status in one functional area (educational, religious, charitable, scientific, and literary or other qualified) for benefit from tax exemption. They are submitted to several audits to receive the nonprofit designation.
- *The functional definition* – Nonprofit organizations are closely linked with the idea of "public interest" or "public purpose". In fact, the essence of "doing the good" and the contribution to society through creation of awareness and supportive action are in its roots.
- *The economic definition* – The most distinguishing characteristic of this type of organizations is the fact that they do not pursue remunerative goals. This means they can't receive the bulk of their income from the sale of goods and services, except from voluntary contributions, which constitute the source of their revenues.

Taking into consideration the concept held by the United Nations Department of Economic and Social Affairs Statistics Division:

"*Nonprofit institutions are legal or social entities created for the purpose of producing goods and services whose status does not permit them to be a source of income, profit, or other financial gain for the units that establish, control or finance them. In practice their productive activities are bound to generate either surpluses or deficits but any surpluses they happen to make cannot be appropriated by other institutional units*" (United Nations, 2003: 12).

- *The structural-operational definition* – To be classified as a nonprofit entity, an organization must comply with the following five characteristics: *organized* (institutionalized to some extent); *private* (institutionally separate from government); *self-governing* (equipped to control their own activities); *nonprofit-distributing* (not returning profits generated to their owners or directors), *voluntary* (involving some meaningful degree of voluntary participation).

Hansmann (1980) identifies four categories of nonprofit organizations. The author distinguishes between the source of funds, composed by *donative* (financing provided by donations and grants) or *commercial* (financing based on fees from the services), and the nature of control, which can be *mutual* (controlled by patrons) or *entrepreneurial* (controlled by professionals), (please see Figure 4), (Hansmann, 1980 *cit. in* Lovelock & Weinberg, 1984).

The concept of membership emerges as the key component for this type of organizations. Such organizations benefit from a more stable consumer base, knowing exactly who its members are and exploiting opportunities to make a surplus or profit (Lovelock & Weinberg, 1984).

In Kotler (1975) organizations' classification, these organizations are composed by a group of people interested in a certain subject seeking to retrieve benefits from it. The major market is the own members and bulk of the challenges they faced are related with the gain, development and maintenance of its supporters (please see Figure 5).

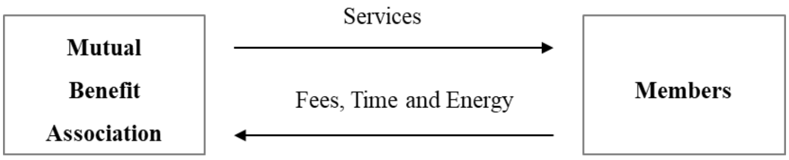

Figure 5. The exchange relations of the Mutual Benefit Association type (Adapted from Kotler, 1975).

For Connors (1980), nonprofit associations belong to the type *Occupation-Related NPO's*, organizations concerned with the restoration, preservation, or enhancement of socioeconomic conditions and the general welfare of a group composed by businesses with similar characteristics and common interests.

In Portugal, the nonprofit sector presents limitations and handles several challenges in an increasingly complex and rapidly changing environment. A study of the Universidade Católica do Porto elaborated in partnership with the Johns Hopkins University pointed four key issues that organizations in this sector need to work on to enhance its performance (Franco et al., 2006):

- *Increasing public awareness* – Subsists a lack of consciousness about the different organizations that composed the sector which limits the "*ability to promote philanthropy, attract public support, and secure policies favourable to its future development.*" (Franco et al., 2006: 28). A clear understanding of these organizations passes by clarifying the specificities of each one and its contribution to civil society. It is crucial to promote the organizations among stakeholders.
  Additionally, there's a pressing need of creation of communications campaigns about the sector, because "*if not exists in the public opinion, it won't have real existence*" (Nunes et al.: 93, 2001). Most Economic and Business newspapers, either physical or online publications, do not show news or updates about organizations in this sector. A representation of the activity, products or services provided by nonprofit organizations in the mind of consumers, users and clients it's required to create a market of exchanges that answers properly to the corresponding and potential consumers and their several requirements (Nunes et al., 2001).
- *Strengthening the legal framework* – The different typology of organizations in the nonprofit sector and their complex regulation lead to a confused

understanding of the laws in force, which diminishes the impact of the sector in Portugal. The answer lies in the consolidation of Portugal's civil society legal structure and suggests a consolidated tax treatment for these organizations, ensuring transparency and accountability on the organization side.

- *Improving civil society capacity* – The low wages and long work hours lead employees to preferentially choose public or private for-profit institutions. Attract and retain talent through a degree or non-degree training programs for civil society managers is a decisive step to take for the professionalization of the management of institutions.
- *Improving government–nonprofit relations* – The level of state support for these organizations is much lower compared with most Western European countries. There is still ambiguity regarding the level of autonomy of the civil society sector and to what extent the state should intervene to support organizations. Bring to the political debate the discussion of a meaningful degree of intervention and autonomy must be on the nonprofit organizations' agenda.

Exposed the challenges, Marketing appears to be the discipline that most fits in the goal of influencing the behaviour of others. Nonprofit managers "*realize that their missions involve influencing donors to give, volunteers to come forward, clients to seek help, staff to be client-friendly, and so on. Therefore, marketing and the marketing mindset are critical to their success as well.*" (Andreasen & Kotler, 2003: 5).

Nonprofit organizations need to know how to be better at influencing all the different publics whose behaviours determine the nonprofit's success (Andreasen & Kotler, 2003). So, the conduction of a set of activities supported in a strategic marketing plan is decisive to overcome the problems described above.

2.4 Marketing in Nonprofit Organizations

Nonprofit marketing corresponds to "*all marketing effort that is conducted by firms or individuals to accomplish nonfinancial goals*" (Lusch and Lucsh, 1987: 616). Some organizations realized that many of their issues and challenges come from the absence or failure concerning marketing, which leads the high-level executives to incorporate, exploit and improve the activity within the company (Lusch & Lucsh, 1987). Additionally, factors as the increasing of voluntarism and the international growth of nonprofit sector enhance the importance of Marketing strategies and tactics (Andreasen & Kotler, 2003).

Therefore, nonprofit marketing it's nothing more than "*the application of marketing principles to nonprofit organizations*." (Lusch and Lucsh, 1987: 16). The usage of marketing principles and tools to help them achieve their goals without profit (Lusch & Lucsh, 1987). NPOs may sell traditional economic goods and services, but comparing with for-profit organizations, the major difference concerns in endeavouring to market people, places, and ideas or causes.

Shapiro (1974 *cit. in* Yorke, 1984) postulated four key interrelated concepts for marketing within nonprofit organizations: the self-interest aspect of transactions or exchanges in which both the "buyer" and "seller" believe that each is actually receiving something of greater value than that which is being given up; the importance of satisfying customer needs; the marketing mix and the idea of distinctive competence in which an organisation concentrates on that which it does better than anyone else.

Some of the most common types of organizations involved in nonprofit marketing are religious, educational, government, health, social cause, political, and cultural. These organizations face specific problems that require special marketing tools and procedures (Lusch & Lucsh, 1987).

As it was stated before, nonprofit organizations do not exist to make a profit, but is often necessary to generate a surplus of sales revenues over expenses. This surplus became necessary to create the proper conditions, like finance new ventures, purchase new equipment, or retire a debt, to enhance the organizations' action, boosting it contribute in the market where is insert (Lusch & Lucsh, 1987).

Nonprofit marketing is mainly concentrated in the resource attraction. Organizations must develop programs to attract resources as voluntary work, tax concessions, fees or donations in money or supplies to continue operations (Lusch & Lucsh, 1987). Consequently, resources are strategically allocated to each client to achieve the aimed objectives.

The dichotomy **resource attraction** and **resource allocation** bring flexibility to nonprofit organizations. Although it may seem unethical and ineffective when compare to the private sector, the approach used for its donors doesn't need to be the same as that used for its clients. Typically, "*the client who receives the benefit of resource allocation is often someone other than the donor who provides the funds*." (Shapiro, 1973: 126). Since there are two different functions to perform and two different "consumers" to satisfy, the marketing task became more complex and requires the satisfaction of both parties involved to be successful (Shapiro, 1973).

Unlike profit businesses, nonprofit organizations success is measured by the attraction of considerable contributions and not necessarily by the satisfaction of its clients. For instance, some associations are better at fundraising than at raising a certain public involved in the cause, like children or elderly persons. Hence "*the success of the nonprofit organization can be measured only in terms of the achievement of goals related to client satisfaction*." (Shapiro, 1973: 126).

Nonprofit organizations face critical market pressures, in the sense that external entities, such as government agencies, industry and professional associations, might influence the marketing decisions. The increasing competition in the sector forces organizations to do a better job in identifying and analysing target markets and implementing a successful marketing mix (Lusch & Lucsh, 1987).

Marketing thinking contributes to lead institutions to search for a more meaningful position in the larger market, by shaping different product or service offers, which involves, in conformity with Kotler's (1979) theory: knowing the needs of different client segments; eliminate the weak services and carrying out a more careful shaping and launching of new services and the incorporation of more effective methods of delivering services and more flexible pricing approaches. Altogether, generate higher levels of client satisfaction and create a "*great potential to third sector organizations to survive, grow, and strengthen their contributions to the general welfare*" (Kotler, 1979: 44).

In most cases, there is a lack of structural marketing strategies tailored to the company's real needs that accompanying the digitization process triggered by the Industry 4.0.

2.4.1 Partnership with the Private Sector

In the twentieth first century, the number of corporations and private-sector marketing executives who are looking for ways to become more closely involved in joint ventures that have a direct benefit to the corporation increased exponentially. Working with nonprofit sector has become an opportunity to explore, giving organizations a humanization process, with concern for social and environmental ideas. As far as reputation and public image are concerned, profit organizations benefit from relationships with nonprofit organizations (Andreasen & Kotler, 2003).

This new set of relationships in which the private marketers participate in nonprofit marketing activities from some private sector gain is referred to as **cause-related marketing.** Nonprofits need to think very carefully before they risk hard-won reputations by temporarily teaming up with the wrong kind of partner. Furthermore, look at some pitfalls that can arise along way can prevent some losses (Andreasen & Kotler, 2003).

2.4.1.1 Social Alliances and Cause-Related Marketing

Cause-marketing has evolved in two different stages. First, NPOs have learned how to initiate and grow individual partnerships. Second, larger nonprofits have learned more about how to manage not just one partnership but a whole portfolio of relationships (Andreasen & Kotler, 2003).

For present purposes, social alliances are defined as "*any formal or informal agreement between a nonprofit organization and one or more for-profit organizations to carry out a marketing program or activity over a significant period of time where*:

1. *Both parties expect the outcome to advance their organizations' missions.*
2. *The corporation is not fully compensated for its participation.*
3. *There is a general social benefit expected*." (Andreasen & Kotler, 2003: 247).

These alliances lead to cause-related marketing, where the activity is interrelated. This is, fulfils the same objectives and attempts to reach the intended outcome with the support of a cause, in the form of an idea, product or service.

2.5. Strategic Marketing Planning Process

Like in profit organizations, the nonprofit marketer must develop an appropriate **marketing strategic plan** towards the organizations' vision and what it wants to achieve, generating unique value propositions to the business under the construction of a strategy (Baynast et al., 2018). The plan, which is also a path, takes place at both the organizational and campaign level (Andreasen & Kotler, 2003).

2.5.1 Mission statement, Objectives, Specific Goals and Values

Marketing is much more than the mere promotion and selling of products or services. The concept entails a "corporate philosophy" which is closely allied to the intended objectives and primary purpose of the organization (Yorke, 1984). Marketing plays an important role in the achievement of the organizational objectives. Nonprofit businesses don't sell products, they sell intangible concepts, something in what consumers believes in (Drucker, 1990).

The first aspect to interiorize is the **mission statement**, the translation of why the organization exists and what is trying to do and add to society. In other words, is "*the basic purpose of an organization, that is, what it is trying to accomplish.*" (Andreasen & Kotler, 2003: 65). "*An organization should strive for a mission that is feasible, motivating, and distinctive*." (Andreasen & Kotler, 2003: 67). As the literature suggests (Kotler & Keller, 2012), the key characteristics of a corporate mission are: state limited number of goals; stress company's major policies, values and culture; define major competitive spheres; take a long-term view and is stated in brief, with flexibility and distinction.

One of nonprofit manager main tasks is to convert the mission into specifics actions, looking at the state-of-the-art, through constant monitorization of the necessities and opportunities in the community. Then, it is important to translate the good intentions into strategies to achieve the aimed results (Drucker, 1990).

The conversion is usually done into **objectives** that state the board direction, what its necessary to pursue in the coming period. An objective can be designated as "*a major variable that the organization will emphasize, such as social impact, market share, growth, or reputation.*" (Andreasen & Kotler, 2003: 65).

The respective objectives must be reiterated in an operational and measurable form called **goals**, which then can be tracked through the organization's evaluation and control system. Goal is "*an objective of the organization that is made specific with respect to magnitude, time, and responsibility*." (Andreasen & Kotler, 2003: 66).

The corporate **values** are an intrinsic part of the organization and show what it believes and stand for in their activity field. Kotler & Keller (2009) stresses those values: lead the action; have a cost; need to be clear, manageable and consistent across time; are for everyone in the organisation.

Only with the definition of these four parameters a marketer can take a better understanding of the nature of the organizational culture and design a proper marketing plan.

2.5.2 Situation Analysis

Mapping the situation and drawing relevant insights into what is happening inside (**internal environment**) and outside (**external environment**) the organization is an important step in marketing research (Kotler & Keller, 2012). In line with Andreasen and Kotler (2003), a marketing audit is an effective tool for this purpose.

2.5.2.1 SWOT

At an internal level, the **SWOT analysis** is a business tool highly used by companies and organizations in the attempt of stating their "state of the art". The SWOT is a matrix with four quadrants, divided into Strengths and Weaknesses compared to competitors, and Opportunities and Threats that reflected the key external aspects that require action (please see Figure 6), (Ferrel et al., 2011).

The aim is to: convert the Weaknesses in Strengths, the Threats in Opportunities, match the Strengths and Opportunities and avoid or minimize the Weaknesses and Threats. This analysis is a guide for goals formulation.

2.5.2.2 STEEPLE

To access the external analysis, it is necessary to perceive the position of the organization in the marketplace at a macro level. The study of the exterior environment can be done using the STEEPLE technique: **S**ocial and cultural; **T**echnological changes; **E**conomic situation; **E**nvironmental implications; **P**olitical; **L**egal and **E**thical issues. The extraction of these factors is useful to know what can and what cannot exploit organizational growth development (Kotler & Keller, 2012). The macro environment reveals the major trends that nonprofit organizations must consider. Many nonprofit organizations conduct this analysis with private-sector assistance, especially with the environment matter.

In a micro context, consumers or clients and competitors are identified and examined.

2.5.2.3 Publics

The consumer analysis requires, foremost, knowing who the consumers or clients are, how do they behave and what are the main reasons for that behaviour. Ferrel et al.

(2011) present some examples of information used to track the consumer: current market segmentation; what are users' needs and how do they differ across segments; track Usage & Attitudes (U&A); understand the buying processes and identify the key motivations and barriers that keep consumers from purchasing the brand or enjoy the service.

The information provided can be extract from different sources, like external studies or internal reports, but the major learning in the research comes from the consumer itself. Data can be collected from two stages in terms of information sources: Primary, with direct observation, focus groups, surveys and experiments or Secondary, which include internal, government, periodicals/books, commercial sources (Ferrel et al. 2011).

Following Ferrel et al. (2011) theory, one of the most common procedures applied are the five Ws: ***Who** are our current and potential customers?*; ***What** do customers do with our product/service?*; ***Where** do customers purchase our product/service?*; ***Why** do customers purchase our products/services? And potential customers don't do so?*; ***When** do customers purchase our product/service?*.

After the identification, it is critical to understand the key publics considered. In general, nonprofit organizations possess certain characteristics which activities differ fundamentally from a commercial company.

Lusch and Lusch (1987) identify two elementary target markets that, in some cases, can be the same:

- Target donor publics – "*the people who give time, money, or other resources to a nonprofit organization*" (Lusch and Lucsh, 1987: 622) following the giving logic triggered by a motivation;
- Target client publics – "*those people who will receive the output or benefits of the nonprofit institution*" (Lusch and Lucsh, 1987: 622). They can be segmented by demographic variables (age, income, education and occupation); geographic variables (region of country or city size); psychographic variables (life-style or personality) and behaviouristic variables (benefits sought or loyalty).

Andreasen & Kotler (2003) complexify the division of the publics and divided them in four types: input publics (donors, suppliers, and regulatory organizations); internal publics (management, board, staff, and volunteers); intermediary publics (merchants, agents, facilitators, and marketing firms) and consuming publics (customers, local residents, the general public, and the media).

2.5.2.4 Competitors

The competition is the second major component to analyse in the organizational surrounding environment. The organization must recognize competitors on four levels: desire, generic, service form, and enterprise (Andreasen & Kotler, 2003).

Keller (2013) distinguishes three kinds of competitors related with the organization's offer: Direct competitors – same type of product/service, same consumer target (versus yours); Indirect competitors – same type of products/services, different consumer target (versus yours); Substitutes – other type of products/services, same consumer target (versus yours).

2.5.3 Strategy

2.5.3.1 Goal formulation

Once the internal and external environments have been analysed, the information collected must take into consideration in the **goal formulation**, which comply with specify numeric milestones for each objective previously stated. Goals should give direction to the organization and describe pathways to its future (Andreasen & Kotler, 2003).

Strategy for nonprofit organizations is "*a statement of what the organization as a whole stands for, what it aims to accomplish, and how*" (Rados, 1996: 177). Marketing strategy include the definition of the target markets and the designing of suitable programs to serve them effectively. First the nonprofit manager must decide the resources to be acquired, develop and allocate. Then, design the course of action in accordance with the outputs of the research conducted (Rados, 1996).

2.5.3.2 Strategy formulation

Initially, the **strategy formulation** implies decisions on: Segmentation (*What criteria should be used to segment the market?*), Targeting (*What segments should the company focus on?*) and Positioning (*How should the offering be designed in order to deliver a unique value proposition to the target?*), (Kotler & Keller, 2012).

Consumers are different, so it is pertinent to recognize some traits and characteristics that can serve as a starting point to new business opportunities. Thus, the offering must be different for each segment. Market Segmentation is the division of a market into distinct groups of buyers who have different needs, characteristics, or behaviour and who might require separate products or marketing mixes (Kotler & Keller, 2012).

The criteria for segmentation can be vast and rich, some examples of the most common variables include: *Sociodemographic*, as age, gender, geography, lifecycle and family, income and occupation, education, events, race and ethnic origin, religion and social class; *Psychographic* with lifestyle and personality, which it divides buyers into different groups on the basis of their activities, interests and opinions; *Benefits sought*, as delivery, product features and price/service; and *Behaviouristic* with readiness, media and shopping habits, ability and experience, loyalty, usage frequency and innovativeness (please see Figure 7), (Kotler & Keller, 2012).

The selection of the segmentation criteria is normally done considering the following parameters: adequate size, relevance (for the product/service category), measurable, actionable (gives direction for designing the value proposition). The identification of a segment follows three basic steps: first, map the current segmentation; second initiate consumer understanding, by trying a segmentation criterion (*do consumers differ?, what are their needs, behaviours and purchase motivations? What are the purchase barriers and the substitutes products/services? and what attitudes towards brands?)*; and lastly evaluate it to confirm their differences and check how extensive the segments are (Kotler & Keller, 2012).

For Targeting, there are strategies to reach the right consumer. Depending on the existence of different targets, the marketing strategy is adequate to each target market, it can be: undifferentiated marketing when there exists only one target, differentiated marketing where are two or more targets or concentrated marketing when the approach is done "one-to-one", this is, for each single consumer (please see Figure 8).

When entering a new target market, it's essential to consider the Markets' Attractiveness, revealed in the size of market opportunity, the competitive environment and the market access (Kotler & Keller, 2012).

Positioning consists on designing the offer and image that the organization intends to convey in consumers' minds regarding the product or service (Keller, 2013). In conformity with Keller's (2013) view, the positioning design passes through the following decisions:

- The target

A key first step is the target definition. It's needed to describe the one who will choose for the organization innovation, it can be the user or the buyer. This is the person to whom the brand is or wants to be the first choice. The target needs to be defined in terms of attitudes, behaviours and values as well as in socio-economics and demographics. Companies must make it as colourful and vivid as possible.

The usual method involves building a target persona, with the purpose to create empathy for the target, to better understand it. Visual and anecdotal profiles of typical consumers for the innovative product or service are created and they are built based on researching consumers and brainstorm sessions.

- Consumer insight

Taking the iceberg logic, look for hints on how the consumer thinks feels and does (extrinsic) and search for their tensions, in the sense of its needs (intrinsic). Great propositions start with discovering good consumer insights, they emerge as the marketer dig into: Clues, thoughts, facts, observations and ideas, for example with the observation of consumers journeys, films, stories and household visits; information nuggets and previous learning, with the results of the investigation and the validation of hypotheses. Insights can generate great opportunities for the organizations.

- Competitive environment

As it was stated before, it's extremely important to look at what and how the competition is doing and what the organization can withdraw from in terms of exploiting new opportunities and emerging new forms of working their products or services. It's advantageous to know who the *service form competitors* are (are the different types of organizations that can help fulfil a desire) and the *enterprise competitors* (are similar organizations competing for the consumer's business), (Lusch & Lucsh, 1987). Describing and analysing the competitors' choices and states clearly the type of its segment (economy, mid-tier or premium) to distinguish the organization from them.

- Unique Value Proposition (UVP)

From all benefits that the innovation offers, it's necessary to underline what it really unique and relevant is. Unique Value Proposition is the unique customer value that a company offers.

A perceptual map is a marketing tool for establishing the UVP that enables marketers to plot the position of their offering against those of the competition concerning consumers' perceptions. In view of the aspects that are most relevant to the target, starting with consumer insight.

After defining the UVP, it's appropriate to write it in a competitive manner. The UVP it will be at the core of the organizational marketing efforts and can be innovatively lighter or stronger.

- Benefits

Finding the right positioning versus competitors encompasses: first identify the most important benefits for the target – start from the base consumer insights –, identify the main competitors and position the brand/organization versus competitors stating the:

- Points-of-difference (given the competitive environment)
  The presence provides the reasons/motives for acquiring the brand.
- Points-of-parity (given the competitive environment)
  The absence provides the reason/motives for not acquiring the brand.

The benefits can be of three types: functional (the value provided by product related attributes); experiential (what it feels like to use the product/service) and symbolic (what it conveys to other about the person who uses it).

Organizations need to define their intended generic position aligned with the benefits offered and the price charged (please see Figure 9).

- Reason-to-believe

The proof that support the Points-of-difference and the Points-of-parity is the Reason-to-believe, that can be expressed in various forms: functional design (e.g.: unique saving technology – UVP: two times more efficient); key attributes (e.g.: unique design – UVP: exclusivity); key ingredients (e.g.: contains calcium – UVP: stronger bones); key endorsements (e.g.: recommended by Heart Health Institute – UVP: lowers cholesterol).

- Values and personality

Consumers want to relate with the person that is perceived behind the brand, not to its attributes or portfolio. It enables the brand owner to deliver a consistent brand experience across the various products, connecting the product ideas under one common umbrella and generating a deeper and more sustainable impression (Kotler and Keller, 2009).

There are few secondary data and most of the times a research request from market research companies is not affordable for nonprofit organizations, which leads to a lack of information about the publics. Most of the nonprofit organizations rely heavily on managerial judgement rather than research in designing marketing mixes (Lusch & Lucsh, 1987).

2.5.4 Tactics

The program formulation contains the planning and pretesting phases of the marketing plan. The most known formulation is the **Marketing-Mix**, composed by the fours P's: Product, Price, Place and Promotion. In services, there are also consider three additional P's: Process, People and Physical Evidences (Kotler & Keller, 2012).

The **Product** includes all the decisions regarding the object/item or service itself. The Product is the heart of the Marketing-Mix. Considerations about: the base consumer value by the UVP articulated with the Points-of-difference and Points-of-parity, the actual product level, as the brand name, logo, slogan, design, features, packaging and quality level, and the augmented product level since the after-sale service, warranty, product support until the delivery and credit (Kotler & Keller, 2012).

The **Price** definition, according with Kotler and Keller (2012), involves four significant steps:

1. Evaluate the value-based and cost-based prices, in view of: UVP and target, based on consumers' perceptions. Depending on much is the price based on consumer value, the price can be adjusted by reframing the value perception, changing the unit of measure, the unit of sale and the frame of reference (buying physically, online or both); Competitors; and Companies' costs, intervention pass through lowering the costs and attending to ROI (Return On Investment) expectations.

2. Estimate the demand;
3. Select a pricing strategy, normally it's between penetration (low-price product/service with the goal of assuring market share) and skimming (adopting a higher-price at the beginning and gradually lowering it to attract thriftier consumers);
4. Establish the final price.

For NPO's reality, it's necessary to consider time costs (the value of the time it takes to acquire a product), travel costs (the direct outlays for transportation), and psychic costs (the frustrations and tensions encountered in purchasing the product), (Lusch & Lucsh, 1987).

Embodied Kotler and Keller theory (2012), **Promotion** entails decisions concerning the definition of the:

- Target audience – normally from the positioning statement.
- Communication objectives – to drive consumers along the decision process, knowing the process of *Learn* (with awareness and knowledge consumers learn about the innovation), *Feel* (with conviction, preference and liking they decide to purchase, find if it is better than the current offer and if they like what they learn from the product or service) and *Do* (action of purchase or repurchase, reliant on the relationship built across the process). It also needed to adjust to the type of initiative, varying from if it is new to the market, new to the firm, additional to existing lines, improvements or revisions of existing products, cost reduction or a repositioning.
- Message – designing the message comes from the *de-brief* of the briefing elaborate by an agency. The content is related with the positioning and works as a guide to get the advertising idea, bringing the UVP to life in an involving and compelling way. This is the base for a campaign.

  The execution comprises decisions on the format (recognise if it is an executional idea and what is the best way to say the product or service symbolically), the structure (find a way to say it logically, point it positive versus negative arguments, do a comparative advertising analysis and order the arguments) and source (decide who should say it, if it makes sense to have endorsers, like experts, celebrities or lay endorsers, always taking to the surface the principle of congruity, expertise, trustworthiness and likability).

In the nonprofit case, advocacy is one of the major activities, and necessity, of this kind of organizations. They often use spokespersons to raise importance for the issues they support. It can be either paid or unpaid, the organization chooses the most suitable person to deliver the message, and for example the President of the organization or the people they represent or assist with their action, as witnesses about its work.

Spokespersons tend to be viewed positively, they are respected as credible experts on a particular topic and are consider by the target audience as highly trustworthy. To decide the ideal person is not easy and depend on both the topic and the issue. The message conveyed by that person must be so clear that cannot be distorted by a target audience (Andreasen & Kotler, 2003).

2.5.4.1 Marketing of people

CEO's, directors and administrators can be marketed as an influencer, a mediatic figure on which other people believe, relies and support. When speaking of opinion leaders, Monteiro et al. (2012) specified it is necessary to distinguish between two meanings, since:

1. The term «opinion leaders» is often used in relation to individuals of high social, political, or business status who make decisions that have great consequences for the community (it is called the power elite). They generally make appearances in the mass media channels. Marketers often seek the support of these individuals to motivate consumers.
2. The term «opinion leaders» refers to a horizontal influence, within the same social level, and each social group is expected to have its opinion leaders.

For someone to become an opinion leader, Monteiro et al. (2012) pointed three factors that are needed: who is (prestige); what knows (information) and where is (accessibility).

In the case of corporations' general-directors, with a prominent position in the company, they are responsible for the structural decisions of the business and, therefore, assume greater visibility (Lusch & Lucsh, 1987). Most of the times, these leaders are considered the "face of the company", especially in family firms where the family constitutes the main attribute of the business (Lusch & Lucsh, 1987).

Lusch and Lucsh (1987) wrote that he or she must "develop a personality" (brand image), get the employees' approval (company image), be coherent with its actions (advertising and distribution), strengthen its position (market share) and convey credibility.

Taking in consideration Monteiro et al. (2012) theory, the administrators mentioned fit into the category of *influencers of social prestige*, those who serve as models and, for this reason, constitute a reference for people.

One of the marketer's problems is to find the reasonable cost to terminate a specific partnership and work with a personality who can sell the organization's products and services credibly and truthfully (Monteiro et al., 2012).

To evaluate if the message is efficient and generate persuasion, the communication execution needs to trigger consumers' *attention* (is memorable and enjoyable), *interest* (is understandable and branded intrinsically at its core), *desire* (it makes people wish for it) and *action* (is communicated effectively enough to affect behaviour and it is persuasive).

After the behaviour is carried out, there are some rewards that works as "reinforcers" to message conveyed. Organizations can strengthen the relationship with the target audience by delivering a follow up of *economic* (examples: coupons, trading stamps, prizes, rebates, chances in a contest, free goods), *social* (examples: praise, commendation, affection, conversation, attention) or *other* (examples: certificates, feedback on achievement) nature. Once behaviour is changed with all communication efforts and strategies, perception may also change (Andreasen & Kotler, 2003).

- Communication tools – the mass communication channels unfold in two levels: *Above the Line*, with the traditional advertising (television, radio, newspapers, magazines, outdoors and cinema) and the internet, and *Below the Line*, with sales promotions, trade, in-store materials, public relations, sponsoring, events and experiences. Personal communications channels include sales teams, word-of-mouth, direct and interactive marketing.

  The selection of the communication tools depends: on the type of the market, if it is for consumer goods, industrial goods, nonprofit world, or other, and on the decision to dig a push (demand triggered by the company) or pull (demand triggered by the consumer) strategy to generate sales and mix both to cover the phases of purchase decision. Joining to the criteria for choosing the tools are the definition of the level of investment and the promotional calendar planning (when each channel tactic happens).

Unfortunately, the promotion efforts of NPOs are often inefficient. They are quite far away from the advantages of doing public service advertisement that the media (TV, radio, press) broadcast or run at no cost to the organization (ads by NPOs), public relations, sales promotions and personal selling (Lusch & Lucsh, 1987).

For this reason, they should exploit the countless opportunities brought by online social networks and platforms, the ultimate channel privileged to express messages and take at the centre stage the intended subject.

The technological progress and the exponential growth of Internet usage led organizations to rethink through what channel they can reach and impact their target audience. For nonprofit organizations, this invaluable new tool to reach and influence the behaviours of audience groups generates a new paradigm in the communication process with every stakeholder. Fleishman Hillard *cit. in* Andreasen & Kotler (2003) developed an Online Integration Model to Promote Behaviour Change (please see Figure 10).

This model is composed by four phases among the target audience: awareness of behaviour, behaviour change, share behaviour intentions and sustain behaviour.

The objective is to "*create an online communication strategy that went beyond building well designed and attractive web sites to building sites that encouraged the development of online communities with individuals personally adopting and advocating a campaign's messages*" (Andreasen & Kotler, 2003: 428).

This approach opens a revolving door where the target audiences have first become partners and then advocates for the campaign's message within their own social networks.

Marketing communications represent the "voice" of company and its brands are a means by which it can establish a dialogue and build relationships with consumers. Marketing communications allow companies to link their brands to other people, places, events, brands, experiences and feelings (Kotler & Keller, 2012).

The **Place** is consigned consider the decisions stated before and the selection of the channels will impact the pricing decisions due to high distributors margins. The selection of the number of distributions channels brings the complexity of the flows, stable financial capacity and specialization. Kotler and Keller (2012) detailed that channel design decisions involves:

- Analyse customers' needs and purchase habits – where do consumers buy today, and segment consumers based on their needs regarding the lot size, waiting and delivery time, spatial convenience, support and information, access to credit and reverse flow.
- Identify and evaluate alternatives – if it will be conveyed a multichannel design (via direct to consumers or indirect with the presence of intermediaries as wholesalers and retailers), depending on the number of levels, types of intermediaries (cost per transaction and value added to the sale) and the number of intermediaries (if it is an *exclusive*, *selective* or *intensive* distribution strategy).
- Setting objectives – define targeted levels of customer service, agree with the potential partners and balance the costs associated to the different distribution channels with the consumers' needs.
- Evaluating and developing – For an innovation to succeed, the distribution partners involved also need to succeed. The innovation needs to provide a good business opportunity for the distributor (for example: providing good margins; driving traffic to the shop) and the brand needs to help the distributor to develop this opportunity (for example: training and motivating the distributors' sales team; providing in-store promotions and communication material).

NPOs usually use short and direct distribution channels with no intermediaries, in most convenient way possible. Sometimes they use agents settled in different places to easily reach the target and spread the message associated (Lusch & Lucsh, 1987).

2.5.5 Implementation Control

The next phase is the Implementation of the tactics defined before, leading to routine performance monitoring and necessary recycling and revision. "*As with all marketing, the campaign planning process begins and ends with the customer*" (Andreasen & Kotler, 2003: 88).

The final step is the development of formal evaluation systems, which are becoming increasingly important as more formal business tools are brought to the nonprofit sector (Andreasen & Kotler, 2003). Evaluation and controlling the performance is necessary to compare the actual and the expected performance, the same with a budget control system, actual and budgeted revenues and costs (Lusch & Lucsh, 1987). The mechanisms used to track and control the feedback of the target audience is extremely important to sustain the aimed strategy, realizing if it is working and if it is necessary to adjust it to the real needs of consumers (Kotler & Keller, 2012).

2.6 Branding

Brands create value to the consumers and to the enterprise. Regard the consumer, the brand contributes to the reduction of the risk in the purchase, identifies the product in its universe of reference and contributes to its differentiation compared to competing products (Baynast et al., 2018).

In the case of the companies, the brand allows to sell more expensive since the value of the image and the value of the use are recognized by the customers. On the other hand, the brand has a “corporate or institutional” value, in addition to being able to develop a strong sense of belonging among the employees of a company, of great relevance for its attraction and loyalty (Baynast et al., 2018).

The image of a brand is constituted by the set attributes that audiences attribute to it. The most salient features of the image correspond to the positioning of the brand that is a strategic concept. These decisions integrate the work designated as **Branding**. Lencastre *cit. in* Baynast et al. (2018) defended that the roles that structure the brand policy are (please see Figure 11):

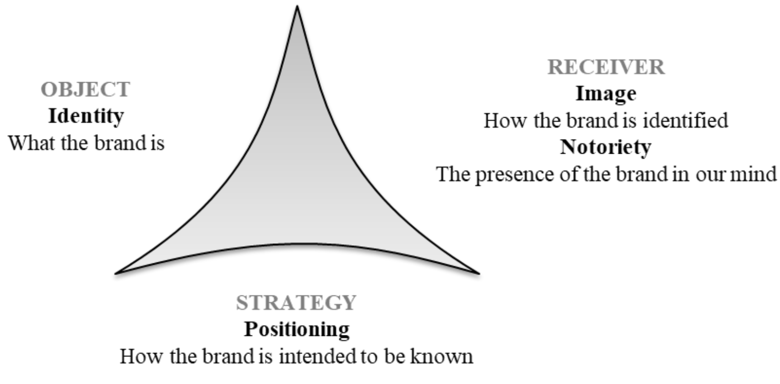

Figure 11. The Three roles that structure the brand policy (Adapted from Baynast et al., 2018).

The nonprofit “marketplace” has become more competitive and resources becoming increasingly scarce, leading several organizations of this type to rethink about the role of marketing to achieve their goals. Brand strategies play an important role in shaping stakeholders’ attitudes and actions (Ewing & Napoli, 2005).

Creating a suitable brand identity is crucial to communicate the organization mission, vision and values. Brand-oriented organizations impact stakeholders by delivered them the tangible and intangible benefits they desire, enhancing organizational performance. Ewing and Napoli (2005) state that the brand management is still very much in a state of infancy in the nonprofit sector.

Brand management is an important driver for long-term performance and helps to credibly differentiate the organization from its competitors, because increase the brand’s trustworthiness and decrease risk in stakeholders’ perception (Beck, 2016).

The brand needs to be treated on a corporate level. The concept of corporate brand identity is defined as a unique set of associations that establishes a relationship with the target audience via functional, emotional or self-expressive benefits (Aaker cit. in Micelotta & Raynard, 2011).

2.6.1 Brand Equity

A brand is a distinguishing name and/or symbol (such as a logo, trademark, or package design) intended to identify the goods or services of either one seller or a group of sellers, and to differentiate those goods or services from those of competitors. **Brand Equity** can be defined as a set of brand assets and liabilities linked to a brand, its name and symbol that add to or subtract from the value provided by a product or service to a firm and/or to that firm’s customers (Aaker, 1991).

In line with Aaker’s (1991) theory, the assets and liabilities of a brand can be grouped into five categories (please see Figure 12): Brand loyalty; Name awareness; Perceived quality; Brand associations in addition to perceived quality and Other proprietary brand assets (like patents, trademarks, channel relationships and others).

Associations constructed from the Brand can be either positive or negative. Marketing communications can contribute to Brand Equity by establishing the brand in the memory of the consumers that create a brand image, as well as drive sales and even affect shareholder value (please see Figure 13), (Kotler & Keller, 2012).

Today, customers privileged memorable and rewarding experiences with brands. For this reason, the sensory, affective and cognitive associations are the ones organizations should generate in people. The benefits associated with a product or service captures the consumers' attention. Quality and usefulness become the main characteristics of products and services (Schmitt, 1999). More than ever, consumers ask for products, services, communications and marketing campaigns that "*dazzle their senses, touch their hearts, and stimulate their minds. They want something that they can relate to and that they can incorporate into their lifestyles*." (Schmitt, 1999: 57). The degree to which a company is able to deliver a desirable customer experience – and to use information technology and integrated communications to do so – will largely determine its success in the global marketplace of the new millennium (Schmitt, 1999).

2.6.2 Branding in Family Businesses

The characteristic of a family being ahead of a business has gained attention as a branding tool and it's increasingly being used by marketing practitioners. To the date, scholarly research efforts have been either conceptual or exploratory, without analysing some case examples. This type of firms is classified as stronger than non-family firms, but their image involves identity-myths that need to be clarified. The perception of a family as brand can be decomposed in two different meanings: on the one hand, the family stands for structural consistency, economic certainty and emotional support, on the other hand is considerate limited, inflexible and old-fashioned (Krappe, Goutas, & Von Schlippe, 2011).

A family firm is a business governed and managed with the intention to shape and pursue the vision of a business controlled by members that belong to the same family and ensuring it sustainably for the next generations (Chua, Chrisman and Sharma cit. in Lude & Prügl, 2018). Family firms have the peculiar ability to ensure the sharing of the same goals, values, beliefs, norms and interactions styles. The owning family itself becomes part of the branding strategy.

2.6.2.1 Communication

Some companies put their family firm status front in their marketing communications whereas others prefer to subtly hint at their family background. Findings suggest that "family" can be represented in very different levels in the corporate message, in some cases, the focus is on the family, in others, in the offering (products and/or services) or in their organization by itself (Astrachan, Botero, Astrachan, & Prügl, 2018).

Firms that communicate it family nature, namely a family business brand, are perceived to have a more authentic behaviour because it is built under the family genesis that is generally accepted in a sociological point of view. This works as a trigger to trust in the brand, leading to being considered preferable by the actual and potential consumers of their goods or services (Lude & Prügl, 2018).

Communication involves listening, assuring that the interlocutor feels part of the project, to be interested in it, to make him live the initiatives, to get him to soak up the values and assume them as his own. The business families know it and they are aware that they have an important challenge ahead to structure, systematize and regulate the areas of communication (Vilanova, 2018). Entrepreneurs close ranks by highlighting the advantages derived from a structured communication: "*almost 80% admit that formal communication mechanisms increase the level of commitment of the family with the company, and 81.3% consider them, also, essential for transmitting family values*" (Vilanova, 2018: 156).

The communication of family businesses is becoming increasingly sophisticated. In addition to the strategic plan, research on interests and content, paper magazines, intranets, digital magazines, closed social networks, WhatsApp groups or apps, they also change the form and substance of that communication (Vilanova, 2018).

Then, they can promote the family business brand using a wide array of communications channels. It's interesting to notice that these firms prefer to use classical channels, like traditional advertising (e.g., television commercials) and direct and personal marketing (e.g., using family members as brand ambassadors, like the CEO's or general-directors mentioned previously), instead of portraying their communication online, where social media assume today a big role in promoting brands and companies. This seems to be a business opportunity that is being neglected and might leverage the company's image and reputation if a digital strategy is developed (Astrachan et al., 2018).

As for the way to communicate, everything is increasingly audio visual. More infographics are created, and a great prominence is given to photography, which, together with video, is perhaps the most important. As far as the background of the communication is concerned, they take care of the message. The families work on storytelling to turn ideas into examples that can be touched (Vilanova, 2018).

For years, the objective of family businesses had been to maintain a low profile. Today, society demands greater transparency, and if they want to protect the company, family and products, they must be prepared. Members of family businesses face a new dilemma: maintaining a low profile with the emergence of social networks. This is an illustrative example of the transition experienced by the external communication of family businesses. Their visibility is now subject to public scrutiny. The “seal” of a family company provides an invaluable mark of quality and reliability. The number of enterprises that used the family members as ambassadors of the brands has increased, especially in the fashion, luxury goods, consumers’ goods sectors where the surname of the family has been converted into a brand (Vilanova, 2018).

For the company, this is being an advantage. In Portugal, exists several examples of businesses starred by the face of a family member, like Delta Group (Comendador Nabeiro), Luís Simões Group (Mr. Luís Simões) and Amorim Cork (Mr. António Rios de Amorim), (Vilanova, 2018).

Furthermore, communicating the family firms can be considered hard to imitate, relevant and a rare resource, making it an innate competitive advantage, which can strengthen the brand equity and contribute to the long-term survival of the firm (Beck, 2016).

2.6.2.2 Corporate Social Responsibility

There is an idea of philanthropy and social consciousness that is intimately connected with the family firms. They incorporate and comply with solids corporate social responsibility plans, bringing to the surface concerns and problems relevant to society. Moreover, family firms are associated with good business practises, like environmental performance in terms of less pollution, ethical behaviour such as less deceptive advertising, and donations to good causes and superior corporate social performance. The support given to the community puts family firms in a privileged position because they are contributing to the state of happiness of the stakeholder (Schellong, Kraiczy, Malär, & Hack, 2018). The creation of workplaces in rural areas and the constant innovation in their offer are visible results of this behaviour.

Family firms have increasingly business concern for issues such as ethical behaviour, good governance, working conditions, impact on the environment, the employment of disadvantaged groups or the development of social areas, like health and education. To continue the founder's work, many family-owned companies create social programs and foundations in the hope that their successors will support social projects. Young people, digital natives and naturally more realistic, critical and willing to fight for a better world, make efforts to minimize economic and social inequalities. These programs will affect the design of the business and its future viability as well the relations with the family nucleus. Philanthropic works are a meeting point for families and are a way of transmitting values to the next generations (Vilanova, 2018).

However, sustainability is not exclusively about social action. It is to practice unique and ethical values that allow the company to have a long-term social reputation. This reputation is built on corporate vision, brand consistency with values, the way employees interact and how they relate to society and their own social responsibility (Vilanova, 2018).

Social action is merged with business action and becomes a seal of family businesses. Now, they must systematize, structure social commitment and make it more sustainable over time, more effective and more profitable. Entrepreneurs are linked to causes and want to catapult them to another level by performing various actions, aiming to reinforce their brand value and positioning in the market (Vilanova, 2018).

Social networks have made consumers more activists, so they increasingly demand from companies and want examples of corporate citizenship. It is not only the quality of the products that matter, the values of the company, the behaviour of the employees and the ethics of the senior management are also in the public domain and can, therefore, be called into question. More than ever, families must build a communication strategy for their company, define the role of its executives, be prepared for a crisis, manage the social networks, be capable to transmit the values, responsibility and compromise (Vilanova, 2018).

Nowadays, crisis manuals don’t work anymore. Today we have turned them into apps to be permanently connected and be able to decide instantly. The decisions must be very fast. The first tweet will mark the state of opinion. All processes must be very internalized because there will be little reaction time. And, by the way, they will need allies. And their employees can be their best ambassadors, also in social networks, always and when they are ready (Vilanova, 2018).

When analysing the presence of the family in acts related to external communication, we observe that most companies distinguish between product and marketing events, on the one hand, and institutional acts, on the other. To convey the message in the intended way, they need to review their position on social networks, the ability to influence, response times, use of an app for coordination, software platforms to engage employees in the diffusion of the corporate messages and, above all, internalize the DNA of the company (Vilanova, 2018).

2.7. Digital Marketing

2.7.1 Blended Marketing

Companies need to find new ways to develop their business, ideally with the simultaneous capture of larger business volumes plus cost savings. Of course, this combination is doubly interesting and difficult to achieve (Dionísio et al., 2011).

Blended marketing appears in this context as a valuable asset to ensure new profitable opportunities. A "blended marketing" approach corresponds to integrating and merging - as much as possible, harmonious - between "traditional" (offline) and digital marketing (online), with the aim of improving content fidelity and better capture of new targets (Dionísio et al., 2011).

Nowadays, there is a clear tendency for cyberspace users to create and disseminate various content on digital content platforms, such as in social networks, in an Era where the potential power of communication of consumers increased exponentially with the improvements in technological tools and the massification of the use of the smartphone (Dionísio et al., 2011).

Therefore, it is in a context of undeniable technological evolution that companies need to take advantage of the enormous potential of ubiquity and mobility of communication so that they can be present where their target audiences are. However, this path is completely new to the overwhelming majority of organizations, including most multinational companies (Dionísio et al., 2011).

2.7.2 Digital Communication

Digital communication is today an unavoidable reality for any brand or organization. Despite being a relatively recent variable, its potentialities and ways of using it are developed permanently, appearing new applications almost every day (Baynast et al., 2018).

Digital communication, in addition to the classic objectives to which it responds, creates new objectives: engagement (stimulating the relationship with the brand); generate buzz, generate leads (potential clients) or conversions (online sales), dynamize targets around an event / idea, simulate, stimulate participation, stimulate recommendation. The targets impacted by this variable are potentially "all" and the object of their communication can be a product or corporate related (Baynast et al., 2018).

Among the different mass media channels, the Internet continues to be one of the companies' preferred choices for the promotion of their campaigns due to several characteristics enunciated by Baynast et al. (2018): strong growth; low costs; quality of production, although limited by technical restrictions; highest level of audiences in general websites; possibility of response and interactivity.

2.7.3 Social Media

We are living in the digital age, where everything is much more instantaneous, where technology and technological news are taking over our interests. Everyone can create a social media account where can share the content they understand. A social network aims to share information, experiences, knowledge and interests (Raposo, 2017). Becomes necessary to distinguish social media from the social network. Social media are the digital tools, for example, channels like Facebook, Twitter and Instagram. On the other hand, the social network encompasses the entire digital system that aims to engage with the people, this includes websites, apps, forums, blogs and other pages on the Internet (Baynast et al., 2018).

The phenomenon of social networks, which was initially triggered by young people, nowadays crosses all age groups. Advances in mobile phones and tablets and their price reduction have led to an exponential increase in mobile internet. The smartphone becomes the preferred channel for accessing various social networks (Baynast et al., 2018). Social networks paved the way for new opportunities through low-cost communication, gave businesses and the public the power to disseminate information quickly and, at the same time, allowed the establishment of beneficial relationships (Laureano et al., 2018).

In the case of NPOs, social networks allow an "*unprecedented arsenal of resources to disseminate their messages and communicate directly with stakeholders, including donors, supporters, clients, and the media. Organizations have begun to develop a* *dynamic web presence, fostering interactivity*." (Laureano et al., 2018: 3). Social networks offer organizations an environment that promotes linking and dialogue.

Social media emerges as an additional communication tool that helps nonprofit organizations to strategically maintain and maximize resources. The utilization of social networks can exploit the understanding of how organizations can better adapt and mobilize their existing governance structures, internal capacities and external environment in support of effective communication strategies in this rapidly changing digital environment (Nah and Saxton, 2013).

The adoption and use of social media can trigger new ways of communicating with the target audience and influencing it, from the dissemination of the organization's services program, and with the governing body by enhancing its lobbying activities. Hereupon, they will know the activity of the organization and will be more predisposed to help the cause, either through donations, volunteering or spreading the word (Nah and Saxton, 2013).

In a brand website, the company organizes and controls its communication. A social network is a facilitated element of all interactions between individuals and brands, but those interactions are not defined or controlled by the brands (Baynast et al., 2018). The exchange of information and content can take various forms: blogs, wiki, forums, mobile applications, photo and video sharing, podcasts, tweets, online communities, and many others (Baynast et al., 2018). On the one hand, they designate a social media phenomenon and on the other, the specific actors that have their own identity and functionalities, such as Facebook, YouTube or Twitter (please see Figure 14), (Baynast et al., 2018).

In Portugal, the social networks have gain importance over the past couple of years. Some statistics[1] reveal the tendency of growing: 4,4 million Portuguese are on social networks; 94% of Portuguese internet users are on Facebook; 69% of people follow brands in social media channels; 36% of Portuguese companies use social networks to connect with customers, suppliers and business partners; 94% of companies do it on Facebook and 78% of businesses choose social media channels to advertise their site.

Today it becomes almost mandatory to be in the digital world to avenge in the physical world. According to Raposo (2017), companies need social networks because: the

[1] Sources: Marktest (2015) and INE (2013-2014)

return is immediate; gain greater visibility and projection; a closer relationship is created with the target (consumers); the channels are direct and interactive (it's a conversation); the contents circulate quickly (there is no time to lose); we receive feedback in real time.

Nowadays, customers do not expect to be given the word: they take it and, more than that, they listen, comment, recommend and trust what other consumers recommend - and take these recommendations into account in their buying decision (Baynast et al., 2018). The company, brand and respective products are commented and evaluated, and can be denounced, denigrated or promoted. Internet users play an important role as communication co-creators, designing and sharing viral campaigns (Baynast et al., 2018).

Digital marketing tools, such as social media channels, are a powerful communication tool for a variety of reasons: speed, efficiency, low cost, and ease of dissemination of messages by very diverse audiences. They are the choice of many nonprofit organizations that strive for notoriety and support (Baynast et al., 2018). Moreover, one of the most advantages of digital marketing is that it is very easy to measure: it has clear numbers and easy-to-understand metrics, which allows evaluating the return of each action much more accurately. But there are other advantages suggested by Raposo (2017), such as: the global reach; it allows interactivity (it becomes more important to listen to the customer than to foist on a product); real time responses and segmentation (allows to reach groups and subgroups, and in the limit, the person).

2.7.4 Social Media Action Plan

Companies no longer fully control their communication, but they can influence it, leading it to the way intended through a strategic reflection that, according with Baynast et al. (2018) should contemplate the following aspects:

- <u>Prepare a swot analysis for social networks based on</u>: market maturity (country, sector) in the use of social networks; practice by large segments of customers, users, distributors and influencers; the policy of the main competitors; a synthesis of strategic marketing objectives and options (market/segments); a synthesis of the objectives and the axes of the digital marketing policy; stadium and balance of experiences on the internet/social networks; internal skills and competences in digital matters (IT, expertise, resources).

- Define the goals in social networks, which can be very diverse: notoriety, reputation of the brand, reputation as a company, amplification of communication in other media, traffic generation, communication the offer, lead generation, sales, customer knowledge improvement, engagement, loyalty, or others. The decision process usually follows this order: define the most relevant objectives; select the priority targets; define the media; identify the evaluation criteria (KPIs) and develop a plan of action.

The plan is a document which supports the message conveyed with the goal to drive traffic to the company's website or social media channels while convincing visitors to take an action, this is, acquire the product or service and believe and defend the company's ideals (NPSource, 2017).

Another path that can be taken for the digital marketing plan development phases is: define the marketing goals (to help identify the primary strategies to get results), setting expectations and KPIs (to measure the digital marketing success), uncover audience insights (and align the content offerings to match their needs) and create a strong online brand (to establish authority on the topics which the organization write about), (please see Figure 15), (NPSource, 2017).

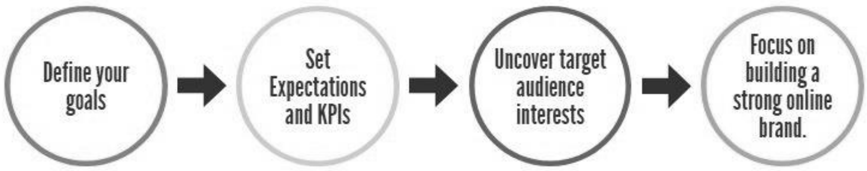

Figure 15. The phases of the digital plan (Adapted from NPSource, 2017).

Either for small or big corporations, the presence in social media allows them to be aware of the new trends, look closely at the brands that face them, interact with their target audience in a direct and spontaneous way, get free publicity and spread their concept (Raposo, 2017). However, getting this is not always easy. The digital universe may be free, but it's not anyone who stands out. There is a lot of information, a lot of talk, a lot of noise, a lot of competition, which means that, in a kind of natural selection, only the strongest survive (Raposo, 2017).

Only companies that know how to generate good conversations, this is, **engagement** can succeed. More than advertising products to be sold, today's businesses need to entertain and inspire. In Raposo's view (2017) this can be achieved through: sharing in community; making the brand closer to the public; creating valuable relations; involving the audience; providing seductive experiences.

2.7.5 Definition of a policy for social networks

The presence in the social networks must be carried out in a gradual way, and can be realized in three stages, pointed by Baynast et al. (2018): **s**elect the networks in which it is intended to be active and ensure a dynamic and relevant presence in them; participate in the conversation using the account or the page, using network advertising spaces, exploring the potential of the word-of-mouth and manage the brand in a shared way, requesting the participation of a wider audience (crowd-sourcing).

In addition, the authors stated that the relevant presence in social networks can assume four main variants: develop the company's blogs, allowing the debate on information specific to the products or areas of expertise of the company; place company pages on community networks; communicate by image, for example, by placing videos on YouTube, which is the second most popular search engine in the world, or share images in networks specialized in this field, such as Pinterest, Instagram or Jelly; communicate on Twitter and listen to what is said about the company, respond in real time, share information, establish a relationship and create buzz.

To gain notoriety and attract sales, companies must take their place in the vast world of the Internet and for this they need to ensure that their content is visible, accessible and shareable. Within this perspective, Raposo (2017) enumerates three golden rules for contents that promote brands:

1. **Visible** – it is not always easy to find the information we are looking for on the Internet. To do this, companies need a good SEO (Search Engine Optimization) which is basically a way to create content using keywords and word ratios to rise positions and appear at the top of the search engines. Do an SEO intuitively, search for the keyword that most likely will be searched in the search engines and use it. Think about the questions that web surfers would ask if they needed the product or service. This will make it easier for potential customers to find the company.
2. **Accessible** – in social networks, it is not mandatory to be everywhere, but it is fundamentally to be where the audience is. For businesses, it is important to be

on Facebook, and probably on Instagram and Twitter, in addition to the website and the blog. In the case of the latter, it is important to think that more and more access to the Internet is done through mobile devices, so it is crucial to adapt them to the mobile version.

3. **Shareable** – everything on social networks is shareable. If the content is good, then people will want to share it. And this is one of the biggest and best features of networks. All must include a share button. Only then will they reach more people.

Consumer behaviour is changing rapidly. "*They are today more active, proactive and hyperlinked, which means that before buying, the consumer collects all possible information about the product, analyses, compares and inspires*" (Raposo, 2017).

The *customer-centred* view of marketing has been declining because the consumer of today is different, by being a "*prosumer*", a fusion between producer and consumer. In social networks, more than consuming, it produces information about the products and services available in the market (Raposo, 2017).

This new type of consumer has created their defences against traditional advertising and distrusts. He knows when someone is persuading him, so it is through communication based on trust and authenticity that he acquires a product or service. "*More than ever, consumers believe in recommendations because people believe in people*" (Raposo, 2017: 43). 84% of consumers around the world make their decisions based on recommendations from trusted sources rather than traditional advertising. 20% to 25% of all buying decisions have as their main factor the well-known word-of-mouth marketing. (Qualman, 2010).

The communication must be sustained in **original, authentic and genuine content**. Only being truthful, companies can impact someone (Raposo, 2017).

2.8 Conceptual Framework

Topic	Theory	Authors
Family Businesses	In Portugal, most firms are family-owned companies. Although, family businesses are a disregarded topic in Portugal. They are considered outdated, small and unprofessionally managed. Moreover, there is no official legislative or legal protection for	Gersick et al. (1997); Ussman (1996); Hernández-Linares et al. (2018); Miller et

	these firms in the country. However, they assume a crucial role for the development of the economy and helping people through job creation and promotion of the regions. The definition can be summarized in the fact that every family business includes any business in which the bulk of the ownership or control lies in a family and the family representatives identify and perceive it as a family-owned business. Family Business is a company managed on the grounds of a certain business vision, which is shared by the same family members, pursuing to maximize its sustainability throughout several generations. The **three-circle model** describes the family business system as three independents but overlapping subsystems: business, ownership, and family. It is a very useful tool for understanding the source of interpersonal conflicts, role dilemmas, priorities and limits in family businesses. Tagiuri and Davis demarcated attributes that are organizational features of these firms and account for both strengths and weaknesses. They have called them the ***bivalent attributes***: simultaneous roles, shared identity, lifelong common history, emotional involvement, private language, mutual awareness and privacy, and meaning of belonging to the Family Business. Family businesses face critical challenges. Some of them, categorized as the most urgent ones, include: professionalize the management, developing an effective, modern and transparent *Corporate Governance* model, and create a succession plan for the future generations.	al. (2015); Chua et. al. (1999); Cabrera-Suárez et al. (2001); Tagiuri and Davis (1996).
Marketing	Marketing is an **integrative process based on exchanges**. Marketing Management is the art of getting, keeping and growing customers from a specific target market and deliver them superior customer value. Marketing has gained significant importance over the past years, being the only activity in the business totally focused on	Kotler (1975); Kotler and Keller (2009); Dibb et al. (2001); Andreasen and Kotler (2003).

	people, bridging the company and the final consumer. By providing unique experiences to consumers, companies generate financial benefits while improving the quality of life of its consumers. The modern approach of marketing reflects the **concern about the consumers**' needs, wants, perceptions, preferences and satisfaction.	
Nonprofits Organizations	The essential element of NPOs is the **voluntary action**. People chase common goals that are not forced to support and don't withdraw any remuneration from their action. Private nonprofit sector is a **set of private organizations providing a wide variety of information, advocacy and services**. There are four different approaches in the establishment of a concrete definition for Nonprofit Organizations: the legal definition, the functional definition, the economic definition and the structural-operational definition. Four categories of nonprofit organizations can be distinguished: *donative* (financing provided by donations and grants) or *commercial* (financing based on fees from the services), *mutual* (controlled by patrons) or *entrepreneurial* (controlled by professionals). These organizations need to work on four key issues to enhance its performance: increasing public awareness, strengthening the legal framework, improving civil society capacity and improving government–nonprofit relations.	Connors (1980); Salamon and Anheier (1992); Anheier (2005); Hansmann (1980); Franco et al. (2006).
Marketing in NPOs	Nonprofit marketing corresponds to **all marketing effort that is conducted by firms or individuals to accomplish nonfinancial goals**. There are four key interrelated concepts for marketing within nonprofit organizations: the self-interest aspect of transactions or exchanges in which both the "buyer" and "seller" believe that each is actually receiving something of greater value than that	Lusch and Lucsh (1987); Yorke (1984); Shapiro (1973); Kotler (1979); Andreasen and Kotler (2003); Kotler and Keller (2012); Ferrel

	which is being given up; the importance of satisfying customer needs; the marketing mix; the idea of distinctive competence in which an organization concentrates on that which it does better than anyone else. The dichotomy **resource attraction** and **resource allocation** bring flexibility to nonprofit organizations. Since there are two different functions to perform and two different "consumers" to satisfy, the marketing task became more complex and requires the satisfaction of both parties involved to be successful. Unlike profit businesses, nonprofit organizations success is measured by the attraction of considerable contributions and not necessarily by the satisfaction of its clients. Higher levels of client satisfaction, generated through marketing activities, create a great potential to third sector organizations to survive, grow, and strengthen their contributions to the general welfare. Companies working with nonprofit sector have become an opportunity to explore, giving organizations a humanization process, with concern for social and environmental ideas. Cause-marketing has evolved in two different stages. First, NPOs have learned how to initiate and grow individual partnerships. Second, larger nonprofits have learned more about how to manage not just one partnership but a whole portfolio of relationships. **Social Alliances** are any formal or informal agreement between a nonprofit organization and one or more for-profit organizations to carry out a marketing program or activity over a significant period of time. The **Strategic Marketing Planning Process** entails the following steps: first the mission statement, with the respective values and goals; next a situation analysis by examining the external environment with the PESTEL and the internal environment with the SWOT; then the goal is formulated, followed by the Strategy; then tactics are designed and	et al. (2011); Keller (2013); Rados (1996); Kotler and Armstrong (2012).

	compose the Program Formulation; finally, the plan is implemented and controlled by tracking feedback. In most cases, there is a lack of structural marketing strategies tailored to the company's real needs that accompanying the digitization process triggered by the Industry 4.0.	
Marketing for People	CEO's, directors and administrators can be marketed as an influencer, a mediatic figure on which other people believe, relies and support. Most of the times, these leaders are considered the "face of the company", especially in family firms where the family constitutes the main attribute of the business. They develop a personality (brand image), get the employees approval (company image), be coherent with its actions (advertising and distribution), strengthen its position (market share) and convey credibility. The term «**opinion leaders**» is often used in relation to individuals of high social, political, or business status who make decisions that have great consequences for the community (it is called the power elite). They generally make appearances in the mass media channels. Marketers often seek the support of these individuals to motivate consumers.	Monteiro et al. (2012); Lusch and Lucsh (1987).
Branding	The image of a brand is constituted by the set attributes that audiences attribute to it. The most salient features of the image correspond to the positioning of the brand that is a strategic concept. Creating a suitable **brand identity** is crucial to communicate the organization mission, vision and values. Brand-oriented organizations impact stakeholders by delivered them the tangible and intangible benefits they desire, enhancing organizational performance. **Brand management is still very much in a state of infancy in the nonprofit sector.** A brand is a distinguishing name and/or symbol (such as a logo, trademark, or package design) intended to identify the goods or	Baynast et al. (2018); Ewing and Napoli (2005); Aaker (1991); Schmitt (1999).

	services of either one seller or a group of sellers, and to differentiate those goods or services from those of competitors. **Brand Equity** can be defined as a set of brand assets and liabilities linked to a brand, its name and symbol that add to or subtract from the value provided by a product or service to a firm and/or to that firm's customers. Today, customers privileged memorable and rewarding experiences with brands. For this reason, the sensory, affective and cognitive associations are the ones organizations should generate in people.	
Branding in Family Businesses	Family Businesses are classified as **stronger than non-family firms**. The "seal" of a **family company provides an invaluable mark of quality and reliability**. Some companies put their family firm status front in their marketing communications others prefer to subtly hint at their family background. The **owning family itself becomes part of the branding strategy**. Firms that communicate it family nature, namely a family business brand, are perceived to have a more authentic behaviour because it is built under the family genesis that is generally accepted in a sociological point of view. These firms **prefer to use classical channels**, like traditional advertising (e.g., television commercials) and direct and personal marketing (e.g., using family members as brand ambassadors), instead of portraying their communication online, where social media assume today a big role in promoting brands and companies. Members of family businesses face a new dilemma: maintaining a low profile with the emergence of social networks. Communicating the **family firms can be considered hard to**	Krappe, Goutas, and Von Schlippe (2011); Vilanova (2018); Lude and Prügl (2018); Astrachan et al. (2018); Beck (2016); Schellong, Kraiczy, Malär and Hack (2018).

	imitate, relevant and a rare resource, making it an innate competitive advantage, which can strengthen the brand equity and contribute to the long-term survival of the firm. To convey the message in the intended way, they need to review their position on social networks, the ability to influence, response times, use of an app for coordination, software platforms to engage employees in the diffusion of the corporate messages and, above all, internalize the DNA of the company. **Social responsibility initiatives integrate the family business soul**. There is an idea of philanthropy and social consciousness that is intimately connected with the family firms. They incorporate and comply with solids corporate social responsibility plans, bringing to the surface concerns and problems relevant to society.	
Digital Marketing	In a context of undeniable technological evolution, companies need to take advantage of the enormous potential of ubiquity and mobility of communication, especially of the social networks, so that they can be present where their target audiences are. **Blended marketing** appears as a valuable asset to ensure new profitable opportunities. A "blended marketing" approach corresponds to integrating and merging between "traditional" (offline) and digital marketing (online), with the aim of improving content fidelity and better capture of new targets. **Digital communication** is today an unavoidable reality for any brand or organization. Digital communication, in addition to the classic objectives to which it responds, creates new objectives: engagement (stimulating the relationship with the brand); generate buzz, generate leads (potential clients) or conversions (online sales), dynamize targets around an event/idea, simulate, stimulate participation, stimulate recommendation.	Dionísio et al. (2011); Baynast et al. (2018).

	The usage of Internet allows companies to: strong growth; low costs; quality of production, although limited by technical restrictions; highest level of audiences in general websites and possibility of response and interactivity.	
Social Media	A social network aims to share information, experiences, knowledge and interests. The **smartphone becomes the preferred channel** for accessing the various social networks. Social networks paved the way for new opportunities through **low-cost communication**, gave businesses and the public the power to disseminate information quickly and, at the same time, allowed the establishment of beneficial relationships. In the case of NPOs, social networks allow a variety of resources to **disseminate their messages and communicate directly with stakeholders**, including donors, supporters, clients, and the media. Organizations have begun to develop a dynamic web presence, fostering interactivity and promoting linking and dialogue. Social networks work as **a communication tool to help organizations strategically maintain and maximize resources**. They contribute to know how organizations can better adapt and mobilize their existing governance structures, internal capacities and external environment in support of effective communication strategies in this rapidly changing digital environment. The adoption and use of social media can trigger new ways of communicating with the target audience and influencing it, from the dissemination of the organization's services program, and with the governing body by enhancing its lobbying activities. **In Portugal, the social networks have gain importance** over the past couple of years. According to Marktest (2015) and INE (2013-2014), 4.4 million Portuguese are on social networks and	Raposo (2017); Baynast et al. (2018); Laureano et al. (2018); Nah and Saxton (2013).

	36% of Portuguese companies use social networks to connect with customers, suppliers and business partners. Companies need social networks because: the return is immediate; gain greater visibility and projection; a closer relationship is created with the target (consumers); the channels are direct and interactive (it's a conversation); the contents circulate quickly (there is no time to lose); they receive feedback in real time. The company, brand and respective products are commented and evaluated, and can be denounced, denigrated or promoted. Internet users play an important role as communication co-creators, designing and sharing viral campaigns. Digital marketing tools, such as social networks, are a powerful communication tool for a variety of reasons: speed, efficiency, low cost, and ease of dissemination of messages by very diverse audiences. **They are the choice of many nonprofit organizations who strive for notoriety and support**. One of the most advantages of digital marketing is that it is very easy to measure: it has clear numbers and easy-to-understand metrics. Typically, a **Social Media Plan** contains the following steps: preparation of a **SWOT analysis** for social networks (what is happening with the current practises); definition of the **goals** in social networks (some common examples include: notoriety, reputation of the brand, reputation as a company, among others); selection of the **priority targets**; definition of the **media** (Facebook, LinkedIn, Instagram, and others); identification of the evaluation criteria (**KPIs** – Key Performance Indicators) and **development of a plan of action**, with content proposals aiming to create a strong online brand (to establish authority on the topics which the organization write about). The presence in social media allows them to be aware of the	

	new trends, look closely at the brands that face them, interact with their target audience in a direct and spontaneous way, get free publicity and spread their concept. Only companies that know how to generate good conversations, this is, **engagement** can succeed. More than advertising products to be sold, today's businesses need to entertain and inspire. Due to the higher amount of information and noise, only the most genuine can stands out. The three golden rules on content for companies affirm their places in the vast world of the Internet are: **visible**, **accessible** and **shareable** content. The *customer-centred* view of marketing has been declining because the consumer of today is different, by being a "***prosumer***", a fusion between producer and consumer. He owns and produces information. **The communication must be sustained in original, authentic and genuine content. Only being truthful, companies can impact someone**.	

Figure 16. The Conceptual Framework (Own elaboration).

3. Methodology

This chapter discusses the type of research used, the reasoning behind it, and the techniques selected to collect and analyse data that will be later used in the execution of the organization's digital marketing plan.

There was a need to get information regarding family businesses, nonprofit organizations, marketing, branding and digital marketing to design a proper marketing strategy and cover the intended goals stated by the Association.

Furthermore, getting previous knowledge in these fields enhances the changes to fulfil stakeholders' expectations and improve their experience with the organization.

3.1 Research purpose

Saunders et al. (2009) differentiate three research purposes often used in the research methods' literature:

- Exploratory – to find out what is happening, seek new insights, ask questions and to assess phenomena in a new perspective. The three principal ways of conducting exploratory research include: a search of the literature; interviewing 'experts' in the subject or conducting focus group interviews.
- Descriptive – to portray an accurate profile of persons, events or situations. A clear picture of the phenomena on which the researcher wishes to collect data prior to the collection of the data.
- Explanatory – studying a situation or a problem in order to explain casual relationships between variables. Analysis of quantitative data is typically used.

The research purpose of the present project is **descriptive** since it includes understanding and getting insights about the Association member's perceptions, opinions and the type of relationship established with the organization, through digital communication processes. Therefore, a portrait of the target audience will be drawn through social media channels to serve as a model for the execution of the plan.

3.2 Research approach

Since this thesis is a descriptive study, the empirical research focuses on gathering information within and about the organization. To test the theoretical framework described in the literature review, a **Qualitative** methodology is conducted.

The prevalence of Qualitative over the Quantitative research is related to the fact that is necessary an explanation on what are "*the ways in which people come to understand, account for, take action and manage their day-to-day situations from the inside.*" (Fletcher et al., 2015: 3).

Getting an immersion on how AEF works allow "*seeing things in context and gaining a holistic overview of the context under study. And to work out the logic, arrangement and structuring of relationships, patterns and rules (whether explicit or implicit) in relation to context.*" (Fletcher et al., 2015: 3), which with Quantitative research would not have the same worth.

There is a whole new world to be explored in the qualitative research field. In the organizational study is necessary to discover relevant concepts to build and test suitable and meaningful theories to human organizational experience (Gioia et al., 2012).

According to Myers (2009), this type of research allows a researcher to see and understand the context within which decisions and actions take place. Also, Qualitative research gives a closer and detailed orientation of the phenomenon that is being studied. With higher intimacy level, the researcher becomes more curious and motivated in studying the people and/or events (Bansal & Corley, 2011).

Being a specific study for an organization, it is equally important to comply with a certain degree of methodological transparency, especially in the empirical phase where the question of credibility of data prevails (Aguinis, Ramani, & Alabduljader, 2017).

Any peculiar and "out of the norm" information or situation occurred during the study is investigated and analyse, justifying the fact that same "outlier" can be a valuable insight or can prejudice, in some way, the proposal (Aguinis, Ramani, & Alabduljader, 2017).

Literature suggests two kinds of research approaches to be considered: deduction and induction. If the researcher starts the research project using a deductive approach, the goal is to seek to use existing theory to shape the approach adopted to the qualitative research process and to aspects of data analysis accompanied by rigorous testing (Saunders et al. 2009). On the other hand, the researcher must want to use an inductive approach if the goal is to build up a theory that is adequately grounded in data, following an accurate process of understanding the nature of a problem and conferring sense and meaning to the collected data (Saunders et al. 2009).

In the case of the present project, it is more suitable to follow a **deductive approach** because the methods which will be selected based on existing information provided by the organization and justified by theory in the literature review.

3.2.1 Data Sample

The data sample is a mix of information about the Association that can be extracted from different sources, from internal documents, reports, internet and social networks, mass media, presentations, testimonies to participation in events or any other content that involves the Association's name.

3.2.2 Data Collection

A reasonable practice is the fieldwork during the internship period in the Association. The data extraction from the organization can be divided into two stages: Primary data, when the researcher creates the data itself by pursuing several data extraction methods (surveys, focus groups or interviews) and Secondary data, if the data result from other sources already treated, this means, information already collected for other purposes that is available and sharable (Kumar, 2011).

- **Primary data**
  - Direct Observation

The first source of data is the direct observation, specifically the participant observation, because involves discursive interaction, spoken or written, with the employees of the Association. Some skills are required for this method to be successful, such as curiosity, spontaneous decision-making, respect for the code of conduct and values of the Association, to build relations of good will and mutual confidence (Lindlof & Taylor, 2011).

This is processed by taking notes about the daily work in the organization, so any sort of information is valid and may become valuable for the future implementation of the plan. Notes are written in haste but are reissued, systematized and selected according to the prioritization given by the Association about the problem stated. Using a field diary allows to a monitorization of the Association practices and, consequently, recognise it necessities.

  - Semi-structured interviews

The technique of interview in a context of an organization is relevant to understand the environment of the Association in an employee perspective. Furthermore, reveals several aspects that can influence employee's behaviour towards a change in their workplace (with the presence of the researcher) and in the Association itself (what the researcher wants to suggest).

Interviews are useful to enlarge and reflect about the insights provided by the literature review. In fact, Lindlof and Taylor (2011) state they can be valuable if they are extracted from three distinct forms: stories (narrative about the foundation and purpose of the Association), reports (technical discourse, certainly about bureaucratic directives) and explanations (specific processes and other phenomena).

A semi-structured interview, with few clear open and closed questions in a prepared script (thirteen questions in total), seems to be the appropriate type to get factual and richer information about the adopted marketing and communications practises. The interview will be conducted in Portuguese as it is Portuguese organization acting in the Portuguese market.

The interviewees are two employees in the organization, the Secretary-General and the Deputy Secretary-General, and two employees from the communication agency they are subcontracting, the General-Director and an Account Manager.

They constitute privileged testimonies, this means, individuals who by their position, action or responsibilities, have a good knowledge of the problem. The interventions are made in the Association's office with an open, transparent and flexible environment. The conversation is voice-recorded with the consent of the participants and their identity will be protected in the project (Quivy & Campenhoudt, 1995).

- **Secondary Data**
  - Content analysis

Secondly, a content analysis is applied to know the perceived image and reputation of the Association. There are several documents available that come from different sources, like articles in newspapers, posts in social media and blogs, websites, official documents, social and political statements from the president, meeting minutes and reports mentioning the Association. The information is analysed in a historical perspective according to the presence or absence of a common characteristic or attribute about the Association in the speech, which is examined by the form and the articulation of the language used (Quivy & Campenhoudt, 1995).

This technique is useful for a better understanding of the actual strategy, value system and overall functioning of the organization, helping to determine the position of the Association in the mediatic space (Quivy & Campenhoudt, 1995).

3.2.3 Data Analysis

After collecting all the data, the next step is to develop a 360º diagnosis about the Association from two valuable tools:

- A strategic Benchmark to see what other players in the market are doing, well or bad, to get inspiration for what operational tactics to suggest.
- The SWOT, a strategic and useful tool to get insights for the plan. The SWOT is for audit and analyse the state of things. All the information extracted in the previous techniques is incorporated.

The analysis of the interviews follows the method of Gioia et al. (2012) as an example. Depending on the answers, they give rise to first-order concepts that lead to second-order themes and, consecutively, to possible aggregate dimensions. Following Gioia et al. (2012) theory, knowing and understanding the lived experience of the informants, the researcher is less exposed to speculation of a reality that does not correspond to the existing one. Diplomacy, discretion and transparency are requirements for this method and, therefore, create a genuine process of genuine research working as **engagement**.

Knowing their *modus operandi* becomes possible to get to conclusions in how to propose a consolidated and functional digital marketing strategy, which has higher chances to be applied.

4. Portuguese Family Businesses Association (AEF)

4.1 Profile

The Portuguese Family Businesses Association (AEF) is a private national nonprofit Association established in 1998 and transversal to all sectors of activity. The Association promotes Family Businesses and seeks to give them a voice in the economic, social and political panorama at the national level. Its main purpose is to promote and represent Family Businesses in the Portuguese economy, helping them to improve their management and to face challenges. All its members are Presidents, Directors, Shareholders or directors of their own Family Companies.

The Association supports their associated businesses by providing training, innovation and helping the businesses grow, as well as creating value with a consultancy network in specialised services. The Association has been organising events, congresses, seminars, conferences, courses and workshops for the last 20 years. It also integrates placement and exchange programmes between Family Businesses.

The Association is affiliated to the Lisbon Chamber of Commerce, the Forum for Competitiveness and the EFB – European Family Businesses. The Association plays a significant role in raising public awareness regarding Family Businesses as an important pillar of the Portuguese economy. Since 1998, an Association created by businessmen for businessmen and its families.

4.1.1 Mission

The mission of the Association is simple: **promote Excellence, from Generation to Generation**, contributing to today's small Family Businesses can transform into the Heineken, Peugeot or Jerónimo Martins of tomorrow.

Part of the Association's work is to lead its Associates, to help them and to give them the necessary means to grow and to continue. Contribute to the involvement and success of Associated Companies. It establishes the strong commitment to support Family Businesses to improve their family organization and management, to broaden their universe of knowledge and to prepare them for the only thing that is right today – change.

Meeting the objectives, it can be said that **empowering Family Businesses in the economic, social and political landscape** is one of Association's main purposes.

4.1.2 Vision

It wants to be the first partner of Family Business. To achieve this, it supports Family Companies of today in the preparation and development of an effective, modern and transparent corporate governance model and in the professionalization of its management, for an anticipated planning of succession from one generation to the next.

4.1.3 Values

At the base of the brand reside a set of solid values. What they believe to be the principles, which govern them now and forever. The values represent who the Association is in the market, differentiating it from the others. **The values guided an Enterprise, Family and the Association.** AEF divided its values into two vectors:

- Core Family values: Family, Sharing and Trust.
- Work values: Intervention, Proximity, Cooperation, Innovation, Adaptation and Dedication.

4.2 Structure

The Portuguese Family Businesses Association was established 20 years ago by some of the largest Portuguese Businesses, which are still part of the Association’s structure and organisation, such as José de Mello Group, Mota-Engil, Alves Ribeiro Group, Luís Simões Group, Manuel Champalimaud Group, among others.

Presently, Mr. Peter Villax, CEO of Hovione Capital, is its President and Mr. José Luís Simões, CEO from Luís Simões Group, is its Vice-President.

The Association is represented in the European Family Businesses, in which Mr. Peter Villax is a member of the Board of Directors. The associated businesses make up one billion euros in turnover, 9% of the European GDP and more than six million jobs.

The Association has two types of members: the *Effective Members*, which corresponds to the Family Companies, companies which have specific characteristics that make them unique and are represented in the Association by their Presidents, Shareholders and Managers of the companies of which they are the owners, and the *Assistant Members* who are composed typically by service providers, an associate figure that has existed since 2008 and are specialist companies in providing support and advice to business families.

Currently, the Association has more than 312 permanent associated businesses (*Effective Members*), of all sizes and economic importance. It also has 28 associated businesses (*Assistant Members*) that provide professional consultancy at different levels.

4.2.1 Governing Bodies

The Association's Governing Bodies is composed by the Board of Directors, the Board of the General Meeting, the Board of Governors and the Supervisory Board, according to the statutes approved at the General Meeting in 2008.

The Chairman of the Board of Directors is Mr. Peter Villax (Hovione Capital’s CEO), the President of the Board of the General Meeting is Mr. Pedro Maria José de Mello (José de Mello Group’s President), the Chairman of the Board of Governors is Bruno Pinto Basto Bobone (Pinto Basto Group’s President) and the Chairman of the Supervisory Board is Francisco Maria Balsemão (Impresa’s President).

4.3 Activity

The Association conducts its activity through five specialized pillars of action: Family, Business Management, Wealth Management, Next Generation and Actions with Associates (please see figure 17).

The five pillars are grounded on the Association’s vision and are based on the interest groups that draw on the Family Business. This action strategy materializes in the formation and sharing of knowledge, dynamism, innovation and creation of value, the Association defines five main pillars of action. Family Companies generally shares a motivation: they seek to develop a culture in the company that mirrors their own family values, making the company an extension of itself. This intimate relationship brings with it an additional requirement: the professionalization of the family.

The success of the family is associated, internally or externally, with the vitality and competence of the company. This commitment is strengthened as successive generations manage to meet the challenges of time and the market.

Although this condition contributes to positive characteristics typical of Family Businesses, it can also be the cause of organizational conflicts and it is about the need to integrate the family factor professionally that the **Family pillar** addresses. The Family Companies have a dominant influence in the economies, by the mobilization of thousands of employees and millions of euros of contribution to the exports and to the Gross Domestic Product. The competitiveness of Family Companies is essential for their own success and for the sustainability of the national situation.

The **Business Management pillar** faces the determining dimensions of business competitiveness and effective business management, such as business strategy, finance, taxation, marketing or human resources management.

These, although transversal to all organizations, must be managed with specificities in Family Companies. Supported by specialized professionals, the Business Management pillar focuses on the diagnosis, recommendation and implementation of best practices so that Family Companies reaches higher levels of performance.

The **Wealth Management pillar** aims to meet the complex management needs of asset families. Specifically, people who have rights and assets and need advice, advising sessions or direct management of their national and international assets. The development, diversification and complexification of the financial and fiscal systems do not allow one to think about the allocation of wealth and its optimization, in a simplistic way. We know that Wealth Management is not the mere composition of portfolios or just considering liquidity but rather the clear understanding that all investment decisions are subject to interdependent - and not always evident - variables of wealth formation, maintenance and growth.

The **Actions with Associates pillar** seeks, within its Associates, effective and assistants, to develop stable and sustainable Family Businesses, by dynamizing, guiding and affirming a prosperous, synergetic and excellent business network, from generation to generation. As such, the Association is actively developing events such as gala dinners, conferences and private meetings to promote this network and create a kind of club where companies buy services from each other and form ties of friendship besides work. The most significant event is the Annual Meeting of Family Companies followed by the General Assembly, where they vote on the three-year plan of activities and elect the governing bodies when applicable.

The main objective of the **Next Generation pillar** is the integration and mobilization of young entrepreneurs from heritage families to the culture of family businesses, to the spirit of succession, initiative and innovation. This is a pressing issue, being identified consensually as the area where Family Businesses need to address in priority. However, when approached at a late stage in the founder's life, it does not always allow an integrated approach with long-term positive results.

This pillar allows the Association's involvement with Family Companies from a multi-generational perspective, through an integrated concept of the succession process (please see Figure 17).

It aims to sensitize past, present and future generations and promote a set of differentiating and proactive actions of succession management, transfer of knowledge, new business ideas or the constitution of business projects.

In addition, the pillars of the Association's activity are decomposed to originate other vectors that are part of the organization's tasks, expressed in the scheme below. They are *Civic Actions*, *Communication*, *Actions of Social Responsibility* and *Congresses* (of which the *Annual Congress* stands out, usually preceded by a Gala Dinner in which the *Family Business of the Year* Award is attributed), (please see Figure 18).

4.3.1 Next in Line Group

Under the Next Generation pillar, AEF created a group for the next generations of family businesses. The **Next in Line** (NIL) is a group within the Portuguese Family Businesses, represented by the next generations of Family Businesses that are members of AEF.

It was established in 2016 by four AEF Directors, being the next generation in their own businesses. This group took off with 20 businesses, which, at the time, made up a total sales volume exceeding 2.5 billion euros and over 10 thousand direct jobs. Over 50 small, medium and large businesses currently take part in this group.

This group aims to promote the sustainability of Family Businesses, by sharing knowledge and experiences, through training sessions specifically geared towards the new generations of Family Businesses and by promoting Networking activities between associated businesses.

The Executive Committee is composed by Manuel Nobre (FAF's Director), Martim Costa Duarte (Costa Duarte Corretor de Seguros's Director), Lídia Tarré (Gelpeixe's Director) and Madalena Freire de Andrade (Sovena's Director).

The group has already organized visits to associated businesses' factories, promoted ludic programmes and events across the country, with conferences that receive testimonials about its interests.

The goals for the remaining year include: promoting more visits to businesses, enhancing training activities, broadening visits to businesses within and outside the group, holding events/training sessions/conferences exclusively dedicated to the new generations of Family Businesses (e.g.: creating Family Day, Christmas Dinner, Summer Dinner and taking part in meetings held by Spanish associations) and encourage national, Iberian and international networking between Family Businesses.

4.4 Services

Once the challenges have been identified, the Association offers the following solutions: Workshops and courses; Specialized services (with the support of the *Assistant Members*); Events: congresses, seminars, conferences, among others; Internship exchange programs between Family Companies; Editing of documents and publications; Dissemination of Family Business in the media; Defence and Promotion of the interests of Family Companies to the Government of Portugal, the European Commission and the European Parliament.

At a National level, the Association develops a set of activities, of which it stands out:

- Internal Awareness Activities (congresses; seminars; conferences; thematic meetings; courses and workshops; business lunches and breakfasts; organization of family meetings; production, editing and distribution of specialized publications).

- External Awareness Activities (cooperation with public and/or private entities such as: business, national and international associations; municipal councils; chambers of commerce and industry; national and international faculties; government departments; international organizations; collaboration with several media organs).

At the international level, the Association is part of the European Commission's expert group (GEEF - European Group of Owner Managed and Family Enterprises), in the person of President Mr. Peter Villax, and belongs to EFB - European Family Businesses, founded in 1997 by the Family Business Associations of France, Spain, United Kingdom, Germany and Italy.

4.5 Channels of disseminating the activities

The means of disseminating the Association's activities include: a specific database and properly worked over 12 years of events dedicated to Family Business, with targeted and high level of detail, that brings the information of the Association at the right moment; a national and international network of Associations and partner entities; the social networks and a website updated daily.

4.6 Social Media Presence

Besides the website, the Association is present in the following social media channels: Facebook, Twitter, LinkedIn and YouTube. The oldest social network is Facebook, dating back to 2010, and the latest LinkedIn.

The collaborators expressed the importance of dynamizing the profile in the latter network to contact professionals and track potential associates.

4.7 Future Issues

Besides the representation and the active role in all efforts to raise awareness of the importance of the sector, nationally and internationally, the Association has the crucial task of promoting the development of a family business institutional framework in Portugal, where is less developed (European Commission, 2009). AEF esteems that it is the right moment to advance the acceptance of the family business paradigm, both as a rightful and valid model for company development and as an inspiration for encouraging new entrepreneurs (Coimbra, 2008).

To meet these goals, AEF needs to gain recognition from its stakeholders. Becoming known and visible to the mass public is essential not only to carry out this awareness but also to attract new supporters and associates. A relatively inexpensive, accessible and broad medium is social networks, which, currently, are little explored in terms of their features and potentialities.

5. AEF's Digital Marketing Plan

5.1 Classification and Target Public

AEF falls within the category of **commercial-mutual organization** since it is paid by its members for the services it offers. The success of this type of organizations depends on the ability to recruit new members and retain them through a continuous process of guidance and providence of services adjusted to members' requirements.

In AEF case, the target market, this is the target donor public and the target client public descripted in the literature review is the same. The effective and assistant members provide it time and money at the same time they enjoy the Association services.

However, the plan will be directed to **two types of public**: **companies** (family companies in the case of effective members and non-family companies in the case of assistant members) and the **mass public** (people of any age from all regions of Portugal).

5.2 Unique Value Proposition

AEF's UVP is: **working as a Family while representing the Family Businesses and delivering them the ultimate advising, formative and ludic service**. The UVP it will be at the core of the organizational marketing efforts and can be innovatively lighter or stronger (please see Figure 19).

EMPRESAS FAMILIARES Associação das Empresas Familiares Portuguese Family Businesses **Positioning**	
Target	Companies own by families.

Insight	Lack of support and representativeness of family firms in Portugal.
Competitive Environment	Business Associations.
Unique Value Proposition	Working as a Family in the representation of the Family Businesses and delivering them the ultimate advising, formative and ludic service.
Points-of-parity	Representation of the interests of private businesses entities.
Points-of-difference	Family essence in meeting each reality as unique, reflected in the way of working.
Reason-to-believe	The ultimate service designed to correspond to each family reality.
Values and personality	Tradition, Sharing, Innovation, Intervention and Excellence throughout generations. Ruler, ambitious and *status quo* guardian.

Figure 19. The AEF Positioning Framework (Own elaboration).

5.3 SWOT Analysis

The field work in the Association begins by tracing a situation, by observing daily tasks, attending meetings and analysing informative documents. SWOT analysis is a good tool to summarize what goes on (please see Figure 20):

Strengths	Weaknesses
- Unique Value Proposition – Family Business representation is the distinguishing characteristic; - Permeability to new ideas and projects (awareness stage, is necessary a shift for action); - Favourable financial condition to carry out	- Some contacts with the Associates do not have a process of accomplishment, it is necessary to ensure a follow-up and to execute an agreement (it is necessary to develop a plan of action for cooperation, exchange of services and supports);

diversified activities of interest (support by Assistant Associates); - Constant networking space; - Personalized and continuous management of the contact with the Associated companies; - A relevant and beneficial network of contacts (Associated companies mutually benefit from their services).	- Little planning in relation to the agenda and tasks; - New practices of communication little explored and inadequate use of different communication channels (website, social networks, newsletters and e-mail marketing); - Low demand for new companies in the domestic and international market ("hunting" of future associated companies).
Opportunities	**Threats**
- Lobbying practices to highlight the importance of Family Business in the economic and social panorama in an election year. Have a more active and frequent role in society; - Provide training (specialized courses), in several areas, to Associated companies through cooperation protocols with different entities; - Benefit from the media to attract a greater level of notoriety; - Digitization process: enhance presence in social media (through social networks); - Order an opinion study on the Association to a Market Studies company to trace the target's perception (Associates) in relation to the matter that the Board of Directors of the Family Business Association deems pertinent; - Possibility of supporting and considering family start-ups belonging to the Association.	- Hypercompetitive environment – the emergence of new associations, entrepreneurship projects and innovative non-family start-ups that may give rise to doubts in the bond to the Association; - Negative perception of the population in relation to the business families (it is imperative to highlight and dignify the positive contribution of Family Companies to society and to the country); - Anti-business policies: high tax burden for businesses.

Figure 20. The SWOT Analysis of AEF (Own elaboration).

5.4 Benchmarking

Look for good practices of sharing in social networks of similar organizations, according to their activity and target publics, for inspiration of posts and designs.

Good examples to follow are innovative and attractive, but without losing the “social brio”. The examples, ordered from the best to the worst example to follow, are given in the table below (please see Figure 21):

Organization	Social Networks Metrics (average)	Features and Content types
1. Câmara de Comércio e Indústria Portuguesa (CCIP)	Facebook – 9.900 likes Instagram – 1.150 followers LinkedIn – 3.000 followers Twitter – 740 followers YouTube – 120 subscribers	Strong interactive component; organized; up-to-date visuals; strong usage of hashtags and mentions to create buzz; publications with news of interest for its Associates; current use of the stories in Instagram; adequacy of the content type to each network; maximum exploitation of network features and consistency of the username and of the profile and cover photographs.
2. aicep Portugal Global	Facebook – 35.500 likes LinkedIn – 26.200 followers Twitter – 112.000 followers YouTube – 780 subscribers	Daily update; exclusive content; use of hashtags. However, the downside is content. The posts contain lots of text, sharing is good but not too much. It must ensure that the followers open the link of the news in question. Also, seems to be little or no interaction with the fans of the pages.
3. FAE - Forum de Administradores e Gestores de Empresas	Facebook – 1.500 likes LinkedIn – 280 followers YouTube – 40 subscribers	Visual coherence with the creation of a visual model for publications (to highlight the brand they use always their logo); frequent use of the Facebook events function; sharing albums with event

		photographs; frequent use of the video to transmit messages (Christmas, Event, Workshop, among others); a strong portfolio of partners (usage of their name and image in the publications) and wide reach of publications.
4. AEEF (Asociación Extremeña de la Empresa Familiar)	Facebook – 870 likes Twitter – 1.000 followers	Sharing tweets from followers; sharing of news and events of the Association. However, the presence is little updated and little worked. The graphics are amateur, and the reach of the publications is very little compared to the followers.

Figure 21. The Benchmarking (Own elaboration).

Since the goal of the Association is to be perceived as "a family working for several families", to achieve the desired interconnector element with the companies associated, it's appropriate to look at not only some Businesses Associations (stated above) but also to some **social media of the family companies**, to know how they communicate and interact with their fans, to get the adequate communication tone during the development of AEF's digital branding strategy.

5.5 Strategic Communication Plan for 2019

The communication agency subcontracted by the Association develops the communication plan for the AEF every year. For the current year, the plan had the intervention of the researcher, in order to alienate its proposals and add value regarding the digital presence of the organization.

The objective of this plan is to structure the communication strategy to be developed during 2019 with a view to strengthening the awareness and recognition of the AEF. In addition to creating a constant communication flow of the AEF throughout the year, the strategy here listed aims to mark the media agenda of 2019 with topics of strategic interest for Family Companies. The communication of the AEF aims to promote the Association at the institutional level, while giving visibility to the associated companies, and, finally, generating interest of new companies in joining (please see Figure 22).

The 2019 communication objectives include: increase the visibility and awareness of AEF in the media; influence the media agenda of 2019 with topics selected as of strategic importance for the Association and its Associates; present the Family Companies as “Modern Companies, with professional management”, “Generators of wealth and of employment”, “Synonym of stability for the Portuguese economy and society”; strengthen media issues related to succession and future generations and maintain constant communication with Associates through social networks, videos and the Association's website.

The communication tactics for the current year are: elaboration of the list of strategic themes to be communicated in 2019; carrying out studies in partnership with Assistant Members (consultants, banks, law firms) on the strategic issues for dissemination to the media and Associates; interviews with the AEF: preparation of synopses on the topics of the interviews, with concrete data and, if necessary, using the know-how of the Assistant Members; media training; elaboration of content, especially in video format, for social networks.

Possible strategic themes: the tax burden in Portugal, for companies and citizens; Innovation in Family Business; need for Economic Growth, low productivity = low wages; succession and new generations in Family Business.

External communication strategies:

- Promotion of regular contacts with the *Lusa Agency* to adopt the position of the Association in relation to current affairs;
- Regular participation of AEF in radio and television programs to comment on current economic and political issues;
- Press releases on strategic topics such as state budget, relevant political and economic data (e.g.: Brexit, exports, among others);
- Voice to the Associates: promotion of Business Case Studies in the media;
- Promotion of interviews and articles of opinion in the media;
- Monitoring opportunities in the media on topics of interest to the AEF.

Internal communication strategies:

- Conducting a national *Road Show* in the first half of the year in 12 major cities, for contact with local Associates and raising new Associates;

- Monthly newsletter submission;
- Develop videos to publicize the activities of AEF with the Associates;
- Promote the digital communication platforms to bring together the AEF and the Associated companies, stimulating their participation and presence in the events and workshops organized by the Association;
- Reinforcement of the brand "Family Business" to generate the feeling of belonging and pride.

The next steps will go through: develop the present plan with the calendar for the whole year; budget the proposed actions (Road Show and Media Training); meet with Associate Assistants to assess their willingness to collaborate on the actions; reformulate the existing social networks and develop a Social Media Plan; implementation of the plan; control and evaluation.

5.6 Online Communication Manual

5.6.1 Introduction

In building a strong brand it is essential to be consistent in how to communicate in all areas where that brand acts. As Peter Drucker once said before: "*60% of all problems in companies result from communication failures*". The ability of the Portuguese Family Businesses Association to produce thought, organize initiatives, mobilize more members, will be all the stronger as it is able to communicate effectively with its target audience: Effective Members, Assistants Members, potential Associates, and Governing Bodies.

In today's world of solicitations and "notifications", on an almost daily basis, there must be the ability to convey the messages in an engaging way to capture attention to the work carried out by AEF. The objective of this plan is to contribute to **reinforcing the communication of the Portuguese Family Businesses Association,** based on concepts of Digital Marketing, Content Marketing, as well as Digital Marketing tools that are now available to all – website, newsletter and social networks.

5.6.2 Concept and Brand

The brand is much more than a logo, it is present in everything they are and in everything they do. It is she who guides the Association. The visual identity is the composition of two elements: the symbol and the logo.

The symbol – the tree with its leaves, the trunk represents the AEF, the leaves represent its Associates who are growing with the support of the Association.

The logo – is a visual, individual form of the graphic representation of the designation “Family Business” (please see Figure 23).

5.6.3 Communication

Communication is defined as a social phenomenon easy to identify, but sometimes difficult to describe satisfactorily in conceptual terms. Every day we experience communication in innumerable ways, but particularly through oral language and symbolic language, in a way so intense and constant that sometimes we do not even realize its "exhaustive" presence in our daily lives.

Communication through online platforms should be: thoughtful, direct, careful, objective and made in the third person singular of the present perfect. The text, especially in social networks, should not exceed **400 characters** so that the company is not so vulnerable and prone to lose readers. It is important to note that the fewer characters we use, the more engagement we get.

Here are two examples of “copy” for posts, with the rules previously mentioned. The first example is regarding the Family Business Congress 4.0, held in 2018 and in which the researcher participated in the organization and management of social networking channels. Note that the examples will be in Portuguese since the Association is addressed to the Portuguese public (please see Figure 24 and Figure 25).

Example 1:
No passado dia 29 de Novembro de 2018 realizou-se o Congresso das Empresas Familiares 4.0 no qual se comemorou os 20 anos da nossa Associação. *Conheça os vencedores desde ano: (link do video do Jantar de Gala)* *#congressoempresasfamiliares #congresso20anos #empresasfamiliares*

Figure 24. The *Copy* for a post example (Own elaboration).

In the previous example, we observed a direct and objective communication, where the purpose is to make known the event that has taken place and to show to the reader that can see the results in videos, thus also increasing, consequently, the visualizations in YouTube.

The second example is the New Year’s Lunch of Family Businesses:

Example 2:
O início de mais um ano chegou e a Associação das Empresas Familiares pretende continuar a apoiar os seus Associados. *Inscreva-se no nosso Almoço de Ano Novo e venha conhecer os nossos Associados e os seus projectos.* *Juntos inovamos e juntos crescemos. #almocodeanonovo #2019 #empresasfamiliares*

Figure 25. The *Copy* for a post example (Own elaboration).

In the previous example, we observe once again a direct and objective communication, where the intention is to show the values of the Association through the enrolments in the New Year's Lunch, namely, innovation, entrepreneurship and the relation of proximity, increasing, consequently, the interaction with the Associates.

5.6.4 Voice Tone and Signature

The Association should have its own tone of voice. This will help outline the personality and actions of it. It is important for readers to recognize Family Business as soon as new content is published on social networks, and for that reason, due importance should be given to branding and graphic identity.

The tone of voice and style of communication are part of the branding, in order that the reader in question does not need to see the logo to be able to identify the Association that made the publication. The **tone of voice used should be the same in written physical materials as in the online world**.

Today's readers do not follow or identify with a brand just "because yes", there must be a link, that is, the AEF must convey, through the tone of voice, the image and values it intends to make known to its consumers. In this case, the most important values that should be transmitted in the tone of voice are **trust**, **dedication**, **closeness** and **sharing**. Aspects to consider when choosing the tone of voice: know how to characterize the public and the way it communicates; define the personality of the brand, that is, consider the adjectives that characterize it, the values in which it believes, as well as the themes most approached by it; define the style of the brand and how it is presented visually (a topic covered in the subchapter "Image and Videos").

At the end of each publication should be the commemorative signature of the 20 years, "***A family working 20 years for success***", in order to be one of the elements that the target audience will remember and, consequently, associate the phrase with Association, making it easier to identify the brand without having to see the logo of the brand.

The tone of communication must be **less institutional and more colloquial** to engage and motivate followers, praising the work of the Associates while the Association promotes its initiatives.

The result is a win-win situation and a perception of followers as a family organization, transparent and effective.

5.6.5 Image and Videos

It is important to know how to communicate graphically and visually, for this there must be some rules to consider in the production and publication of images and videos in the social networks of the Association.

In each original image published on Association's Facebook and Instagram, in the lower or superior right corner, there should be the Association logo and a smooth frame around the image (please see Figure 26), the purpose of this action is to make it easier to identify the brand through the visual style of it and encourage the sharing of it to other pages, reaching more people.

In the original videos shared on social networks, the brand logo must be present with its name in the upper right corner, the crucial difference compared with the images is the inexistence of the frame (please see Figure 27).

The visual aspect is the first impact that the target public has of the brand in question, consequently, it is important to delineate certain rules for visual publications, made official in a **Manual of Graphic Standards** (usually followed by the explanation and characteristics of the logo), so to be easier to identify the brand without having to "search".

5.7 How to Communicate Online

The presence of the Portuguese Family Businesses Association in digital refers to: provide current and reliable information; create/disseminate relevant information of interest to Associates, Assistants Members and Potential Associates; produce attractive and quality content; be present on the various platforms; involve the public; show availability and willingness to listen to opinions; show the work developed and be truthful and authentic.

5.7.1 Digital Marketing Tools

AEF should comply with the creation and development of the following tools to enhance its online presence and performance:

1. Website
2. Blog
3. Newsletter
4. Social Media

1. **Website**

The website functions as the business card of organizations on the internet. Organizations must, therefore, invest in a readable, easy-to-navigate, accessible content, fast and customer-focused website as a strategy to drive results. The information must be permanently accessible and up-to-date.

The AEF website should function as a portal so that its audience can communicate with the Association through forms with suggestions, opinions and criticisms.

Attending to the field work during the internship period, a detailed analysis was done to the current website. Although the site has been on the air for many years, it presented serious errors of content, design and programming:

a) Navigation – The site is easy to find (just search on Google using the words "families" and "companies") and the URL is intuitive – http://www.empresasfamiliares.pt/. The SEO (Search Engine Optimization) presented it's well orchestrated and the keywords are well defined in the search engines to appear at the top of the first pages.
   Since you enter the site, we come across an extensive message from the President. In the column on the left side, you will find the agenda of the next events and below the links to the directory of Associates, something that goes unnoticed.
   The menu is poorly organized and refers to links that are no longer active. The navigation is not effective, and the exaggerated subcategorization of the menu causes the reader to get lost and confused. For example, the list of Members is repeated in the menu and in the left side column.

The search engine inside the site does not work and you cannot subscribe to the Newsletter in the space indicated in the right-side column. Redirect links to social networks are wrong, and YouTube videos in the column also do not open.

b) Design – The site looks a sloppy, amateurish and nothing up to date look. The overall look, with the columns on each side, resembles a blog and not an official website for an organization.

   The colours follow the line of the AEF logo, but they are not the same, following more exaggerated and gaudy tones. The images are deformed and stretched, and the majority have poor resolution quality. There is more than one typeface, which makes the look even more confusing and unbalanced (please see Figure 28).

c) Content – Content should be the fundamental part of a website. Although the content is updated, it is very dispersed, extensive and expressed in a way that is not appealing to the reader.

   The agenda and news are adequate to the topic of Family Business, although there is no prioritization of news. The content is entirely in Portuguese, there are no English or Spanish versions for foreign partners and companies.

   There is no interactivity with the reader, since it’s not possible comment and share content on the social networks. The tone of the site is too institutional. It should be more familiar and inviting.

   There are no Terms and Conditions and information regarding the Privacy of the site data, an important topic with the implementation of the European law of the General Data Protection Regulation (GDPR).

   Although there are FAQs (Frequently Asked Questions) these are outdated and do not cater to anything about browsing the site.

d) Credibility – Given the Association's history and reputation, the AEF website is considered a valid and reliable source of information. The availability of the information of partners and general contacts gives the site a seal of guarantee. On the contrary, their responsiveness is very low.

e) Technology – The Association website is far from being adapted to the reality of technology. The format and design are not suitable for various types of devices (desktop, tablets and smartphones), so it is not “mobile friendly”, and the site map is, as expected, disorganized. To make matters worse, links to social networks do not work and the icons do not load, disregarding them.

Being the only portal on Family Companies in Portugal, it is necessary that it be appealing and, mainly, intuitive.

After several meetings, this analysis was presented to the Board of Directors and the redesign of the website was accepted. There followed a whole process of exploring the best ways to edit the site. After several attempts, the result is as follows (please see Figure 29).

a) Navigation – The link will remain unchanged since it is already recognized and contemplates a good SEO in the search engines. The first major change relates to the redesign of the site menu. It will be more subdued and organized, with only seven categories to the detriment of the old eleven, counting with the homepage.

   The first page now has a brief description of the Family Companies, followed by the agenda, some numbers and facts, the icons of the areas of activity and, finally, the alerts of the Assistant Members (please see Figure 30).

b) Design – The design is now much cleaner, appealing and interactive. The colours are soberer, the images in high resolution and definition and the font is the same in all areas of the site.

   The graphics and icons become standardized, following the same image line of the site. A gradient of colours is made, from the lightest to the darkest, to accentuate the important themes.

c) Content – The content has become much more succinct, updated and revealing of the positive contribution that Family Businesses bring to Portugal. The tone of the communication appears more inviting, appealing to the sharing of news and events.

   Also, the site News was highlighted, as well as the interviews granted to attract media attention. All the services of the Association are clear and the advantages of being an Associate are highlighted. It is also added the opening hours of the Association in the footer.

   To clarify and synthesize the work of the AEF, the Association compiles everything in a Press Kit to be a news story.

d) Credibility – In the section of the Areas of Action, the National Action of International Action was distinguished to show the reader that the Association carries out its action across borders, collaborating with foreign Associations and European organizations, which are formalized as partnerships.

   Additionally, the selection of the pictures is done under the most important events for the Association, revealing some power and credibility about who visits.

e) Technology – The great change of the new website is even the suitability of the same to all devices. The site becomes mobile friendly, fast access and very intuitive. There is also a great emphasis on social networks, with the icons redirecting to the same ones at the top of the page.

   The addition of a button (*I Want to Join!*) for an online membership proposal, by filling out a short form, is also a breakthrough. To further simplify, the Google Maps interactive map with the address is added to Contacts.

   Finally, all the documents that are on the site are downloadable securely.

2. **Blog**

A website can incorporate a blog, but this can also be an independent body. A blog is a diary-shaped website. Content is updated regularly and engages in a lot of interactions with the target audience. A blog can be used to share opinions or share the news.

3. **Newsletter**

The newsletter is one of the simplest tools for doing content marketing. Its focus is the production of content, not so much sales, as it is with email marketing. It is a fixed publication of the organization, directed, in the case of the AEF, to the current and potential Associates. The most common is to be sent via email.

Must have: periodicity defined (biweekly and monthly tend to be more effective than those sent daily), an editorial line and a visual coherence.

To maintain the interest of Associates, and potential Associates, it is necessary that the newsletter brings novelty, has a clear and objective language, with short messages and easy to read. If the newsletter does not offer anything useful to the reader, it will eventually go to SPAM.

The AEF can put content such as opinion articles, events, mention examples of associated companies, proposals to companies, among many others. The content must be dynamic, objective and creative.

The title of the subject of the email should be sufficiently attractive, concise and objective enough to stand out in the reader's mailbox.

One tip is for AEF is to always place their social networks at the end of the newsletter. This will increase engagement with the organization.

4. **Social Media**

5.3 million Portuguese use social networks[2], which translates into an opportunity to talk and interact with the Associates, as well as to impact and make themselves known to potential Associates through these platforms.

Managing presence on these platforms has become an increasingly challenging task for companies: there is more and more noise, there are more companies and brands to communicate, more ads, more social networks where people and organizations disperse their attention.

Tips for AEF social networks:

- Upload content frequently (once a day, five days a week). Do not forgetting that it should be purely informative, at least three times a week, and more directed to “sale” of the services provided by AEF and membership fundraising in the other two days of the week;
- Placing videos (generate excellent interaction rates);
- Use good hashtags (like *#empresasfamiliares*, *#familybusinesses* and *#casosdesucesso*);
- Share your own content;
- Interacting with other pages with points in common with AEF, mentioning them (*@nameofthepage*) in the publications;
- Putting the information in the best hours (the AEF should analyse the period of the day when its audience is more inclined to consume information and interact. Usually, in the early morning and at night. As soon as the AEF has this

[2] Source: Marktest Bareme Internet (2018).

information, it should not deviate from these times and, consequently, it will create habituation in the reader);

- Create relationships with followers;
- Modify the contents according to the social network in question (adaptation);
- Start the posts with questions: "*Did you know...?; Have you noticed that ...?*" (it's a call-to-attention).

In this section, it will be discussed the main social networks used by the Portuguese, their characteristics, how and in which situations the AEF should be present in them, as well as some mock-ups made and approved during the researcher's internship period.

It is important to emphasize that all content for social networks here presented will be in Portuguese since it is a Portuguese organization directed to the Portuguese public.

➢ **Facebook**

Facebook is considered the most relevant social network at national and international level. It is here that most of the Portuguese have their profiles, which has led to thousands of Portuguese companies bet on a professional presence on this platform. In Portugal, 95% of Internet users claim to have a Facebook account[3].

The Facebook page is one of the business cards of the organizations and should, therefore, be visually appealing.

The name must be the one by which the company or organization is known: the user name (changed for *@associacaoempresasfamiliares*), which appears in the page link, should be the same as the other social networks and up to the website.

The profile and cover image must unambiguously identify the company's activity and must comply with the correct measures of Facebook:

- Profile image – where the brand logo is usually placed, which should be changed infrequently, it must be in a square format (170X170 px);
- Cover image – the cover is the most important visual element on the page. It should be thought to the people who visit the page for the first time and convey clearly what is the AEF and what it is dedicated. In addition to the image, here

[3] Source: Marktest Consulting "Os Portugueses e as Redes Sociais" (2018).

you can put a video (820X312 px), (please see Figure 31). Note: Measures change very often but are always up-to-date at www.facebook.com/help/.

The profile photo should be the same on all networks to create visual coherence and to associate the brand with the AEF.

In the "About" section the AEF should clearly and directly explain what the Association is and reason of the page. A good example to apply is:

"*Somos uma Associação privada, sem fins lucrativos, de âmbito nacional e transversal a todos os sectores de actividade. Existimos para ajudar a Empresa Familiar a melhorar a sua gestão, a alargar o seu universo de conhecimento e a prepará-la para a mudança*".

- Content Creation

It's the content that a company, brand or organization shares that will make someone decide or not to follow it (please see Figure 32).

Tips for producing content:

- Define and test various topics to be covered on the page;
- It should produce appealing and striking content. Content arrives organically at an average of only 5% of followers, due to the news feed algorithm that filters the information it sees in the feed. Therefore, it is necessary to create contents that are impossible to ignore (the colour is the main element);
- Test various schedules and formats (AEF, video and images);
- The video should be captioned and be noticeable without sound. The first three seconds should be impressive and have branding;
- Do not put too much text in the images, not to be penalized by Facebook, but also to make them more appealing;
- Bullet points may be used. For example, it can be used arrows to enumerate something.

- **LinkedIn**

It is an excellent professional network for organizations operating in the business to business (B2B) sector, but it can also be useful for business to consumer (B2C) companies.

The commercial and human resources departments of companies are closely linked to this social network in the identification and hiring of professionals. It is also one of the chosen platforms for institutional communication.

LinkedIn integrates profiles of individual people and pages for companies. The most suitable format for companies to be present on this platform is the **company page**. The page allows presenting the company, share content and have the employees associated with the page as “people working at AEF”.

In addition, it can be added a showcase page that allows having individual presences, for example, for different initiatives. Example: a showcase page to promote the New Year's Lunch of the Association. This page is always linked to the Association page. A company page can link up to 10 showcase pages.

The Association had only one profile on this network, one profile that an individual should have and not one page. It was, therefore, suggested and created the company page and currently has more than 300 followers and has been growing (please see Figure 33).

- Content Creation

Like Facebook, knowing who AEF is going to talk to and its goals on the net are the starting point for creating content for this social network. On LinkedIn, publications have a more institutional nature, that is, business-focused nature.

Tips for producing content:

- Do not just talk about the AEF. News should be shared about the sector and that AEF deems relevant to its public;
- There should be an effort to make regular publications (two to three times a week);
- The best results are achieved through succinct and direct publications. LinkedIn recommends 150 characters;

- Add call-to-actions, that is, an appeal like "*Learn more on the link* ...";
- Images with size 1200X627px, minimum 200px wide;
- Images with branding and consistent with the colours and graphics line of the brand;
- Possibility of segment the content according to the profile of the reader to whom the message is directed.

Also, on LinkedIn, it's possible to create ads, which can also be targeted, that is, to be seen by the people defined. LinkedIn itself offers some criteria (please see Figure 34).

Note: As important as the content, are the answers that AEF gives on its page. It should be attentive to the observations and comments, in order to respond and clarify in a short space of time.

- **Twitter**

Twitter is a social network that had many Portuguese users, between 2008 and 2001, but many ended up leaving this network. However, many journalists, politicians and people of renown remain tied to Twitter. It is a good network for sharing ideas and proposals. Messages (*tweets*) can be up to 280 characters long.

The dynamics of contact is made easier on Twitter because is just to identify the person and send a *tweet*, while on Facebook we have to wait for a message or comment.

The great advantage of Twitter for business is to allow searching for keywords or profiles for directly and automatically contacts people.

In Portugal, Twitter is a niche social network, much used by communication professionals, public relations, technology and marketing professionals, although users with different profiles are found. Curiously, in Spain, almost all types of companies have a presence in this social network.

Tweets should always be analysed for interaction with followers. And just like on other social networks, there are tools that allow companies to do monitoring every time they are mentioned: *Twitter Analytics* and *Tweet Deck*.

Sharing links in *tweets* is always a plus because *tweets* cannot exceed 280 characters, so it's a way of adding information.

In the case of the AEF, which is present in news, a *retweet* should be made. In doing so, is interacting with the page of the newspaper or magazine which, in turn, becomes aware of the existence of the Association (please see Figure 35).

- **Instagram**

Instagram is one of the social networks that have emerged among the Portuguese. Today, it is the second best-known network and the second most penetrating network, with 60% of social network users claiming to have Instagram, a figure that rises to 91% among the youngest[4].

The Instagram page is a kind of graphic diary of the organization, this is, a visual social network, as such must be visually appealing and interesting to faithful followers. Like what happens on Facebook, companies can bet on Instagram through ads or the creation of a professional page.

Both images and videos should be square-shaped to take up most of the followers' screen as they scroll. In the case of "stories" they should occupy the total screen.

The Association was not present in this social network. Therefore, and at the request of the Association, it was created a professional account on Instagram.

- Content Creation

In Instagram, the contents are available in the following formats: image, video (duration between 3 to 60 seconds) and stories (disappear after 24 hours unless placed as "featured").

Instagram has the advantage of allowing to search for keywords or *hashtags* and, consequently, interact with users (please see Figure 36).

Tips for producing content:

- Direct and shorter writing than on Facebook. However, today, Instagram users are already starting to be more predisposed to consume a little more text, than at the beginning;
- The use of *hashtags* and *emojis* is very common to impact more people and generate more interactions;
- The "stories" are a huge trend with countless views. It is a way of showing content "of the moment" (please see Figure 37);
- It is good practice to make reposts and share the content of users who mention the company;

[4] Source: Marktest Consulting "Os Portugueses e as Redes Sociais" (2018).

- Since the links in the posts are not clickable, it is important to suggest followers "*See the link in bio...*".

➢ **YouTube**

YouTube is, after Google, the world's most-used search engine, which acts as a video library. Videos are a trend in various social networks. Facebook itself gives priority to this format to the detriment of others.

As with AEF, companies can either have a YouTube channel or bet on ads on this platform. Living in a video era where everything is ephemeral, the presence in this network is crucial (please see Figure 38).

How to optimize and customize the YouTube channel:

- Put a description of the channel, direct, objective and with the defined keywords;
- Description of videos and titles with the same keywords and language that users would use in searching for that content;
- Add a URL to the website and social networks where the company is present;
- Videos must be organized by Playlist (to conveniently organize the page and make it easier to access the videos);
- Create an AEF presentation video (institutional video), which will be featured, for visitors who have not subscribed to the AEF YouTube channel);
- Consistency between visual materials;
- Placement of video at least once a week;
- Identification of the keywords.

Using the *hangout* tool is a good practice for business because it allows having conference calls for free.

Note: YouTube has a *Video Editor* tool that allows to cut and edit videos, add music, place captions, add cards and notes to make the video more interactive generate traffic to the website, or simply to complement the content of the video.

5.7.1.1 Influencer Marketing

As mentioned in the literature review, the Association can and should use renowned figures from the Portuguese business landscape that are linked to the Association in its online communication.

In AEF's case, the President, Mr. Peter Villax, or family businesses Chiefs Executive Officer (CEO's) and Directors can also play the role of influencers, because many of them are considered opinion leaders.

Big business leaders, represented in AEF, like Mr. Comendador Nabeiro (Delta Group), Mr. António Rios de Amorim (Amorim Cork) or Mr. Alexandre Soares dos Santos (Jerónimo Martins) assume the leadership in their family businesses and are known by the masses as visionary men who never stop reinventing business and continually contribute to the Portuguese economy growth.

This type of communication is very important to attract people's attention as they have all built an opinion on these leaders and like to demonstrate it on social networks. It's a positive tactic to spark emotions and, subtly, strengthen the brand connection (please see Figure 39).

5.7.1.2 Event Online Communication

During the period of internship at the Association, one of the challenges was the communication of the commemorative Congress of the 20 years of the Association, which occurred under the theme of Innovation. Following the theme of *Family Businesses 4.0* and according to what was requested by the Association, it would make sense to develop a communication strategy totally adapted to the online.

The profile and cover photograph of all social networks were changed to a commemorative of the 20 years, referring to the Congress (please see Figure 40). A *hashtag* was also included in all the publications related to the event to create a conversation topic and generate buzz: *#congressoempresasfamiliares*.

As a first action was created a microsite (www.congressoempresasfamiliares.pt) for the Congress, in view of the channelling of ticket sales and the information of the entire program, since it was a large Congress, lasting two days (please see Figure 41).

The next step was to create a Facebook event to reach as many people as possible, combining it with a surprise factor in its communication, revealing the speakers one by one. The Event comprises all the details of the Congress (hours, location, and a poster as the cover image.) The secret is to feed the Event with publications released at the right time. The Facebook event, in addition to serving as a reminder, helps keep the target connected to the initiative (please see Figures 42 and 43). During the event, pictures of the speakers were posted during each panel, attracting the interest of those who could not attend and those who liked to come (please see Figure 44).

The great innovative element of the communication of the event was the *Lives Videos* made from Facebook. Facebook has Live Video streaming functionality. The followers of the page will be able to attend key moments of the Congress.

It was suggested to the Association that interviews should be conducted with key speakers and some *Vox-Pop* during the breaks to probe the attendees' opinion. Facebook was the chosen network for this action given that it has a higher number of followers compared to the other networks. In the place, a studio set was set up to interview the guests and, at that moment, its interview was transmitted on the Facebook page of the Association, an initiative that was praised by all participants (please see Figure 45).

Using the new functionality of Facebook were made ads aimed at the target. This means, posts that are sponsored (have a reduced cost) but are more easily viewed by the followers (people who have "Like" on the page). The post-event communications focused on the development and launch of the videos of the Congress and on publications of thanks to sponsors and participants (please see Figure 46 and 47).

6. Project Conclusions

The aim of this master’s project was to create a digital marketing plan for the Portuguese Family Businesses Association.

The researcher started by doing the literature review covering important nonprofit organizations and marketing concepts, in both traditional and digital perspectives, that must be understood before executing a digital marketing plan for this kind of organization. As the company plans to communicate its nature and services like a family, it was also necessary to research about family businesses and how they ensure their communication and marketing systems.

The digital communication plan was then developed according to the steps and recommendations made by the authors studied.

The first part of the plan consisted of context analysis, both external and internal. The external analysis covered aspects related to competitors, by doing benchmarking to get inspiration for further actions. The internal analysis was based on the SWOT tool and, also, on the information provided by the Association, including documents, presentations, meetings and the interviews done to the Association's employees throughout the execution of this project.

Based on all the data collected, as well as on the marketing and communication goals established by the Association, it was possible to start thinking of an adequate strategy to be implemented. It was necessary to define more clearly some branding aspects such as brand values and image, according to the company's positioning, mission, vision and overall philosophy. Then, the key message was designed, the tools to transmit it were selected and the communication ideas and suggestions for tactics and actions on social networks were created and described in detail, explaining how to do it, step by step.

Besides investing in traditional marketing (presence in traditional media channels, like newspapers and television), the researcher also recommended following a digital-based strategy through social networks to create brand awareness while transmitting an innovative attitude. This modern approach will provide the Association with the notoriety it aims and needs.

6.1 Key Performance Indicators (KPIs)

From the first change, the results of the implementation of the plan were notorious. The ratio of interaction with publications increased, with more likes and comments, the number of shares followed this trend, and, the most visible result, the number of followers doubled (when the researcher entered the Association only 2.200 followed the AEF on Facebook), improving the rate of *engagement* with followers.

The strategy of creating a Facebook event for the 2018 Congress was also positive. The event was able to reach more than 5.200 people, only in an organic way, obtaining a relevant number of responses (please see Figures 48 and 49).

The trend of good results was transversal to all social networks. On Twitter, the number of followers has increased, YouTube has gained more subscribers, on the LinkedIn company page and on Instagram, most recently created, and the trend is for growth counting with more than 300 followers in each of them.

With the increasing reach of publications, the AEF brand has also become better known. During the internship period, the Association made headlines in various media, both physical and online, under the theme of the 2018 Congress. These include President's visits to well-known television programs (including *SIC Notícias*), newspaper news and an interview for the online Expresso that has become the most shared interview ever of Expresso in its Facebook page, totalling more than 3.300 shares (please see Figure 50). Also, on the Facebook page of the Association, this interview was the most shared ever.

Thanks to this recognition, the Association was able to attract more attention and formalized new partnerships, including Google partners, arranged meetings with government deputies who met the Association through online, as part of its work to raise awareness and protection of Family Businesses in Portugal, and established contact with the LinkedIn headquarter in Ireland.

6.2 Interviews

In the conduction of an interview it is crucial to give voice to the informants, namely the people in organizations. Knowing and answering their thoughts, intentions and actions allow creating rich opportunities for discovering new concepts (Gioia et al., 2012).

The script of the interviews can be divided into two parts regarding the content of the questions asked to the informants. The first five questions are related to AEF goals as a nonprofit association attempting for notoriety.

All respondents agreed that the Association's key message is primarily to support the growth and development of the families with a business. This is the characteristic that distinguishes it and makes it unique from other associations in the market. The Account Manager of the communication agency said, "*It is an Association very close to its members, and it has been able to defend the interests of the families*".

According to the employees, the marketing strategy that comprises the years 2019 and 2020 mainly involves holding events, with the Road Show topping the list. They said this initiative is important to create awareness and promote the services of the Association, which is very concentrated in Lisbon and Porto and aims to reach other centres of the country, such as other district capitals and islands. This way they will also be closer to their Associates, who come from various parts of the country.

Another point of the plan stated is to intensify the presence of interventions by President Mr. Peter Villax in the media on themes of national life, namely related to the Government. The implementation involves a more assertive presence in the mass media, including opinion articles and interviews.

In another aspect, the responsible for the communication of the Association ensures that the aim is to "*modernize and standardize the communication channels of the Association. Making the message common, namely with the website and social networks*". Qualitatively, the desired return is to increase people's awareness and, of course, to increase the number of associates in quantitative terms.

Regarding the issue of reaching foreign Associations, according to the Association's Deputy Secretary-General, the aim isn't reach across borders, but to create partnerships with that Associations, in order to create an exchange of knowledge between Associates. Hence the holding of events, for example in Spain, with the Associates and not with the Board of Directors of the Association. "*It is important to promote meetings, exchange experiences and, in some cases, create synergies and promote Portugal*", said the General-Director of the communication agency contracted by AEF.

According to the same contributor, the Association's work at the European Commission with the European Family Businesses is discreet and lonely, and it is not part of the focus on the plan, but it is crucial in the work of representing these companies regarding processes and procedures. "*Economic questions are decided at a European level, so it is essential for the Association to have an active voice inside the European Union*", said the General-Director of the communication agency.

The second part of the interview is exclusively devoted to digital marketing. Everyone agreed that it is important to streamline the Association's service through the digital world. Digital transformation is necessary. However, it was also expressed by all that there is a long way to go in this area. "*First, it is important to think strategically and methodically within the Association*", said the Secretary-General.

In relation to the needs facing digital marketing, the main challenges highlighted by the employees are: reaching people and the uniformity of the Association's image. There is a tendency to "slack" the image which causes incongruity and entropy in external communication. "*So, it is essential to redesign the website for the image and impression reasons we want to make on people*", said the General-Director of the communication agency.

It is important to reach more media and increase the amount of news to cover the goal of notoriety. Video is today becoming a powerful tool for dissemination. As stated by the responsible for the communication, it is important that Associates speak and testify about the Association with their cases as an example. At a more mainstream level trying radio and television, having a family business rubric is also an idea for reaching different audiences.

The question of which channels, offline and online, which most favour the relationship with stakeholders, unanimously answered e-mails and, secondly, social networks. However, the digital posture as an entity must be worked with care without losing "institutional veracity". It requires attention to the type of content it needs to be shared, knowing that a lot of content goes via email. There's no doubt that it is important to be online for disclosure, and all the informants expressed that fact. In order to influence it is important to continue the relationship with the press and radio, in conjunction with the work done on social networks.

The General-Director of the communication agency said that "*Social networks serve to maintain the day-to-day relationship with members and, at a second level, to attract new members when they realize that it is an added value to be with the association*".

According to the Deputy Secretary-General, naturally, LinkedIn is the most appropriate network since the news shared there is professional in nature. Facebook appears here to be more trivial, stated the same employee. Theoretically, it's LinkedIn, but Associates are really on Facebook. On the opposite, follow the Secretary-General, the Facebook it's the primordial network to communicate with the members. This was one of the questions that generated the most disagreement as they have different views on being on social networks.

In line with the Deputy Secretary-General answers, the big campaign with measurable data was an event, the NIL meeting in Porto, because resulted in a high number of new members entering. However, results analysis is not done for this kind of initiatives and financially it makes a difference. The Secretary-General stressed that "*the coverage of the 20th Anniversary Congress was very positive and reached very good numbers*". The communication responsible said that "*even with the new website we have already received more visits. Google Analytics shows us that we are gaining a solid and loyal base of followers*".

Everyone agrees that the researcher's work was positive, but one employee made a point of stressing that "*Miguel did a great job on social networks at the November Congress*", proving the effectiveness of the researcher's work during his internship. There was a lot of noise around that as it was a very well-designed campaign and people showed interest in learning more about the Association. “*And it is this interest that makes our work useful. Social networks are important for people to know who we are*”, specified the Secretary-General.

“*The communication over the last six months has become more organized and systematic*”, told the General-Director of the communication agency. Social networks were a good input in communication strategy as more people with shared content were reached. In reputational terms have also grown because the information shared is relevant for AEF's image.

The path is to continue to have an active presence on social networks. “*Not everything has been done, but the Association has taken a big step in recent months with your help*”, expressed the General-Director of the communication agency about the researcher contribution. The Association's demand for continuous communication has also increased with the actions developed.

Exposed the informant’s answers, the figure below shows the organization of data into 1st and 2nd order categories to facilitate data structuring. The 1st-order analysis tries to faithfully take the terms of the informants and the 2nd-order analysis suggests concepts that may help the researcher to describe and explain the phenomenon he is observing. When 2nd-order concepts are clarified and reveal importance on a theme or domain, it becomes possible to enumerate aggregate dimensions that guide the activity of employees in the Association (please see Figure 51), (Gioia et al., 2012).

1st Order Concepts	2nd Order Themes	Aggregate Dimensions
- Family businesses representation and support as a distinctive feature; - Create awareness and promote the services of the Association are the goals of the marketing plan; - Importance of holding events (e.g.; RoadShow and Congress); - Intensify the Association's presence in the media channels with more interventions and news; - Create partnerships with the foreign associations; - Reaching people and the uniformity of the Association's image are the main needs in digital marketing; - Social networks as a primary channel of communication for the disclosure.	- Modernization and standardization of the AEF's communication channels; - Striving for notoriety; - Desire to improve social media channels (careful share of contents and importance of the video format).	- Change context; - Social media as an added value.

Figure 51. The structure of the Data from Interviews (Own elaboration).

7. Project Contribution

This project provides an efficient digital marketing strategy which includes specific communication ideas meant to be implemented by AEF that has just begun its presence in the social media world. The work developed is supported by recent studies as well as research conducted by professionals in the marketing area.

This digital marketing plan was based on the latest trends in social networks communication, hence including live-streaming, for instance. It was created to target both businesses and people interested in the subject of family businesses.

The AEF began immediately to gain a new life online. According to the figures stated above, the Association has increased its number of followers, which translates into an enlargement of its original audience. In addition, the feedback to the reformulations and publications has been very positive, expressing itself in a considerable increase in the number of interactions in all the social networks.

Combining with the traditional media actions (television appearances and newspapers articles), the Association gained a new position, since it increases the awareness which, consequently, contributes to its notoriety and credibility as an associative entity.

In addition to the digital work, during the internship period, the researcher was asked to elaborate a database, since the existing one was very dispersed and outdated. A database was then categorized with all contacts, year of entry, membership fee and other relevant information to the prosecution and continued contact with all Effective and Assistant Members.

Finally, this body of work consists of a good starting point for other researchers to further analyse other examples of marketing and communications within nonprofit organizations and make some progress in the nonprofit marketing area.

8. Project Limitations

During the execution of this project, the researcher faced some challenges. It was difficult to reach consensus among all communication actors on the tactics to be applied. For example, only a few agreed to create an Instagram account for the Association, but the Secretary-General approved the idea.

The absence of scientific literature and concrete examples of digital marketing in nonprofit associations has also made it more challenging to create actions without a guiding foundation. However, advice from industry professionals and the literature review on branding in family-owned businesses has greatly helped in the decisions made.

It was also difficult to create larger communication actions since it is a nonprofit and its resources – material and monetary – are scarcer. But thanks to the help of partners and supporters, including Associates, many actions have been taken.

Additionally, the contact with the communication agency and its services was slow and, for the most part, without a solid strategic direction, as decisions were made on the spot, in a hurry and improvised. However, drawing up an annual communication plan with the intervention of the researcher helped to address this shortcoming.

In addition, care must also be taken in publications made on different pages. The subject Family Business, as shown in the literature review, is still sensitive to the Portuguese because it is associated with nepotism and traditionalism, with the transfer of the company to family members, even if they are not working in it.

Therefore, it is necessary to adjust the tone in the publications so as not to cause rebellion by the audience. The boundary between the institutional and the colloquial is very thin, making it a limitation on what tone of communication to use. More than paying attention to what it shares, it is important to know how to share.

Given the suggestions, the challenge now is continuity. The management and communication of social networks have changed radically, now the important thing is that the team can continue the work of researcher and continue to evolve, otherwise, it won’t have the results desired.

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10. Appendices

1. Literature Review

a. Marketing philosophy evolution

To better understand the contemporary marketing management, it is useful to evince the different business orientations toward marketing in the private sector over the last century, because some of them persist today. Andreasen & Kotler (2003) distinguish three orientations:

1. The Product Mindset

Started in the industrial era, with the development of the radio, the automobile and the electric light, the development of new products with innovative features was the fundamental issue of organizations. "*A product mindset towards marketing holds that success will come to those organizations that bring to market goods and services they are convinced will be good for the public*." (Andreasen & Kotler, 2003: 41).

2. The Sales Mindset

The Great Depression of the 1930s triggered an abrupt drop in demand and companies entered a period of excess of capacity. The challenge was to persuade consumers and convinced them to buy the product they need. The role of advertising and personal selling gain importance during this period. "*A sales mindset toward marketing holds that success will come to those organizations that best persuade customers to accept their offerings rather than competitors' or rather than no offering at all.*" (Andreasen & Kotler, 2003: 41).

3. The Customer Mindset

In the late of twentieth century, consumers became wealthier and more sophisticated in what they need and want. The power is now in the hands of consumers. Organizations had to change their marketing planning and start not with the organization but with the consumer at first glance. The modern approach of marketing reflects the concern about the consumers' needs, wants, perceptions, preferences and satisfaction, implementing techniques to improve the knowledge about them, like surveys, focus groups, and others. Not only the offerings meet consumer's requirements, but also the whole business vision takes part of this "customer-centeredness". Employees interiorize that, more than working for the CEO, they are working for the customer, improving their way of life.

This gain special significance in Nonprofit Organizations, where the selling of ideas, appeals and awareness of society for diverse topics that, in some way, strives to contribute to the consciousness and welfare of populations, wakes up and reminds the primary purpose and existence of organizations. "*A customer mindset toward marketing holds that success will come to that organization that best determines the perceptions, needs, and wants of target markets and continually satisfies them through the design, communication, pricing, and delivery of appropriate and competitively viable offerings*." (Andreasen & Kotler, 2003: 42).

Figure 3. The priorities of Family Businesses for the next two years (Adapted from a KPMG study, 2018).

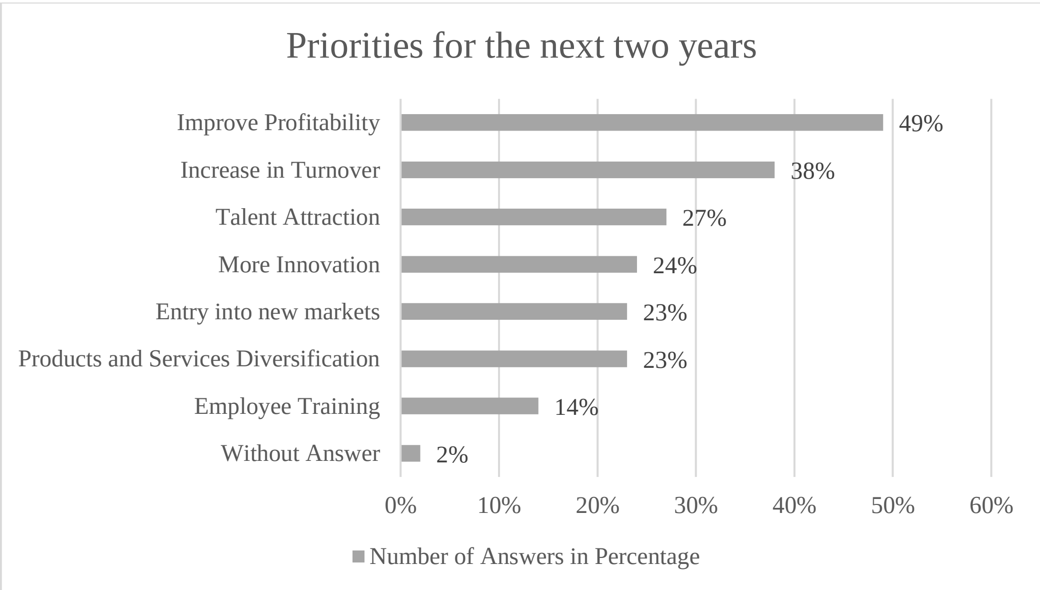

Figure 4. The categorization of nonprofit organizations (Adapted from Lovelock and Weinberg, 1984).

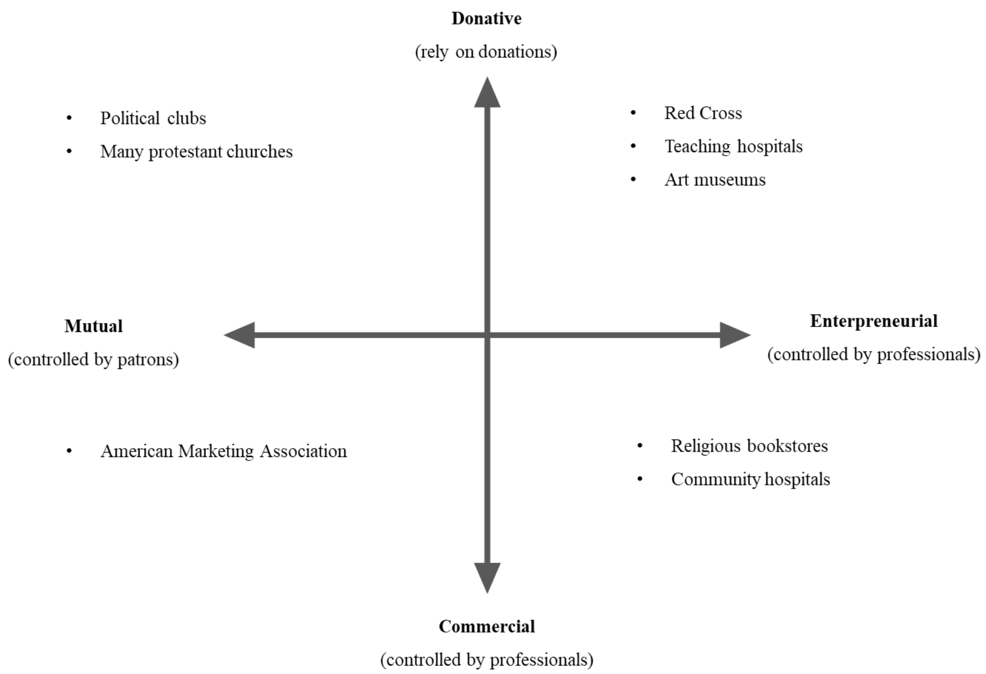

Figure 6. The SWOT Matrix (Adapted from Ferrel et al., 2011).

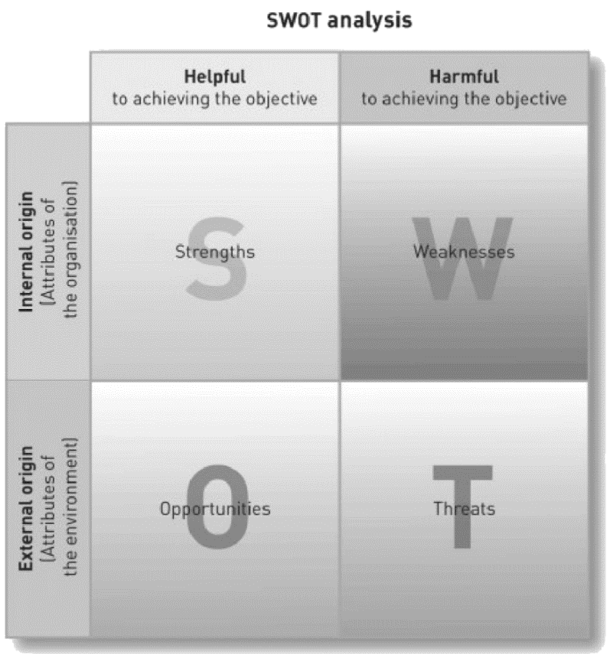

Figure 7. The Readiness diagram (Adapted from Kotler and Keller, 2009).

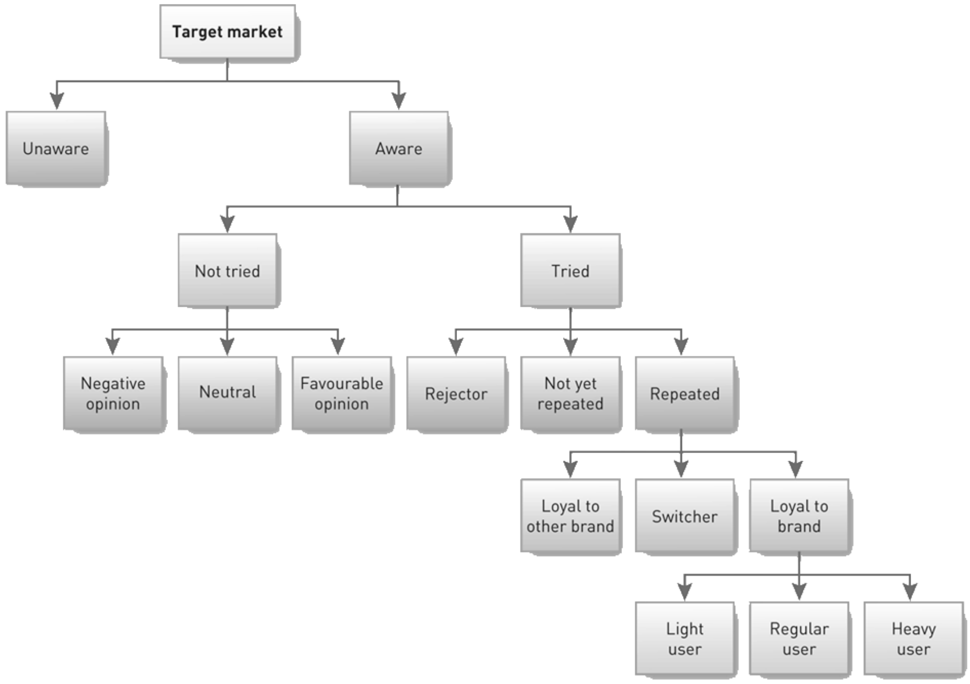

Figure 8. The Targeting strategies (Adapted from Kotler and Armstrong, 2012).

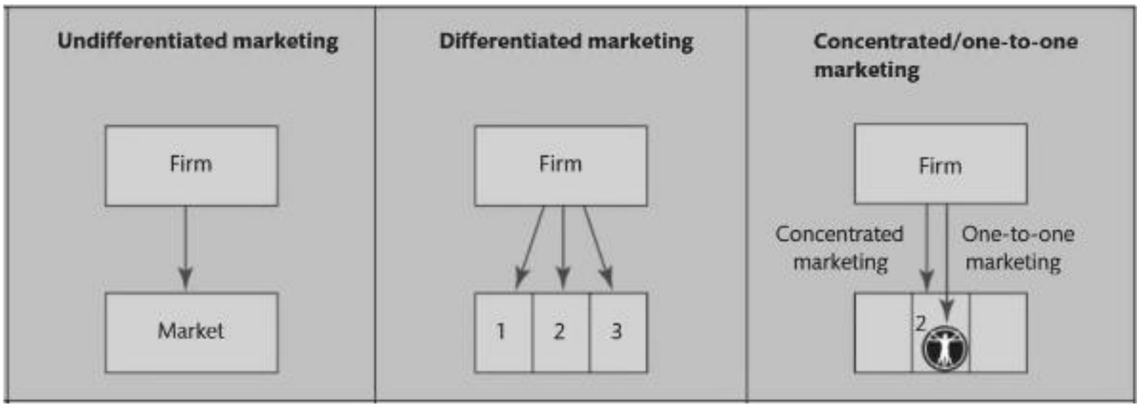

Figure 9. The Matrix Benefits versus Price (Adapted from Kotler and Armstrong, 2013).

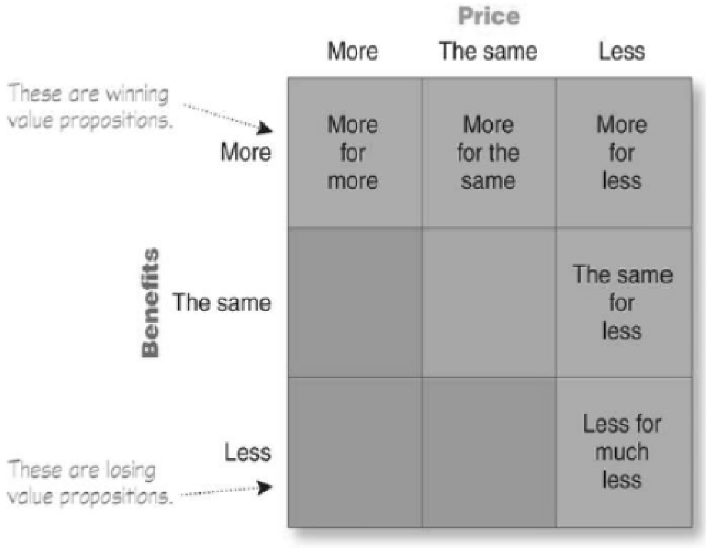

Figure 10. The Online Integration Model to Promote Behaviour Change (Adapted from Andreasen & Kotler, 2003).

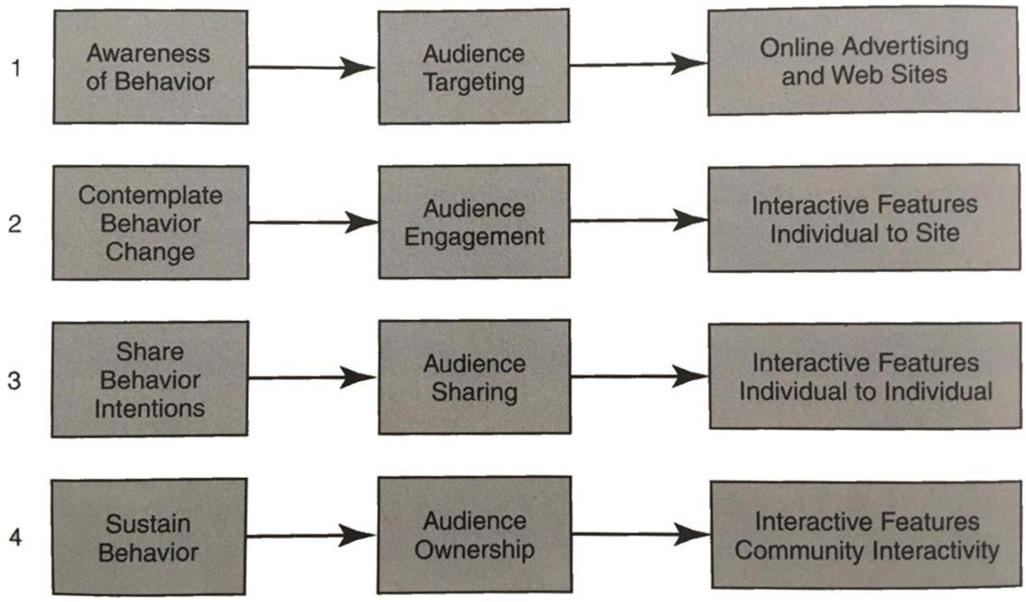

Figure 12. The Brand Equity five categories and value provided to the customers and to the firm (Adapted from Aaker, 1991).

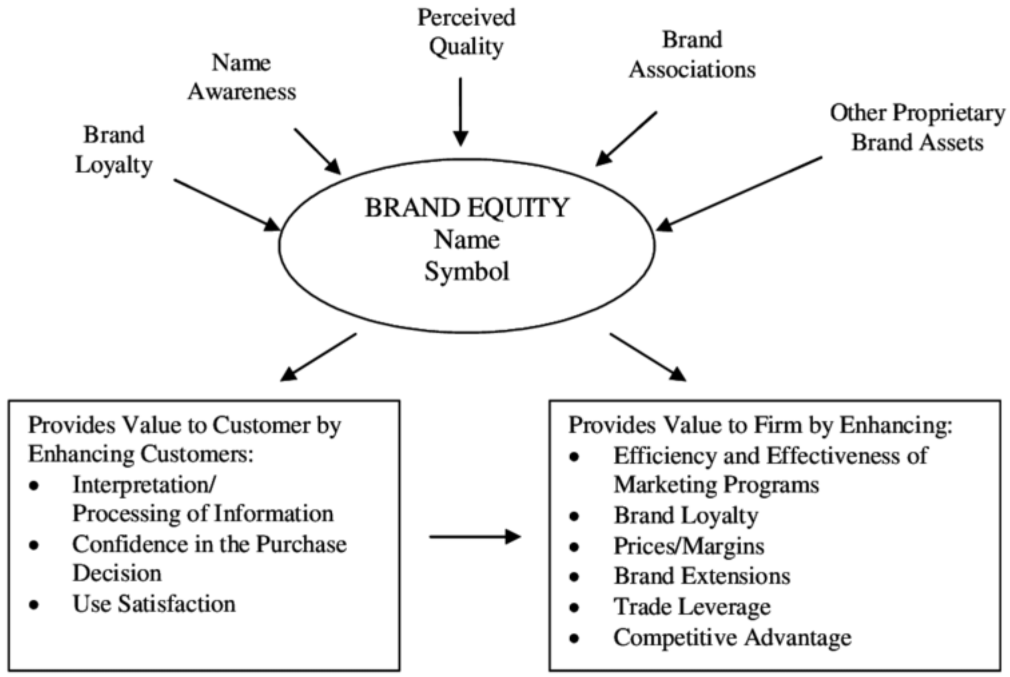

Figure 13. The dimensions involved in the Brand Equity construction (Adapted from Keller, 2013).

Figure 14. The most popular social networks (Own elaboration).

Social Network	Description
Facebook	Launch in 2004, the Facebook is the most well-known and used social network in the world, with more than 1.4 billion users. This platform unites people from all over the world and has innovation in its DNA. Facebook constantly updates its platform, to be always innovating and to attract more users.
Instagram	This social network has a few years but quickly gained a reputation, being known as the social network to share images and photographs. With the upgrade of *Instagram Stories,* the network has gained new momentum and made everything more ephemeral.
Twitter	Is a discussion platform that allows users to send and receive updates of the people they follow, using only 140 characters. In order to discuss a topic, the user has to put the famous #hashtag (a tag that helps to locate the theme) about the subject of discussion that starts the debate. With more than 300 million users worldwide, Twitter is a serious case of the success of microblogging. Strangely, in Portugal, Twitter did not achieve the same success.
LinkedIn	Being the world's most well-known social network, LinkedIn is basically a way to get the curriculum online if it is kept it for looking for new contacts. Networking is the keyword.

YouTube	YouTube has the peculiarity of dedicating itself exclusively to the sharing of videos, where immense bloggers, musicians, comedians and even companies share their experiences. Video as an election format continues to grow on social networks, so it is natural to watch an even bigger explosion of the YouTube phenomenon.
WhatsApp	Began to be an independent social network but in 2012 was bought by Facebook. It is dedicated to the exchange of instant messages, much used for conversations and is, probably, the most private of all. We can only add someone if that person is on our list of phone contacts. It is widely used in the professional sphere.

2. Methodology

a. Interview Script (in Portuguese)

Q1: Qual é mensagem-chave da Associação?

Q2: Como é que a AEF se posiciona e o que é que a distingue das restantes associações empresariais no mercado (APD, fae, entre outras)?

Q3: Um dos objetivos da Associação para o triénio 2019-2021 é aumentar a notoriedade da Associação investindo em atividades de marketing. Como é que será implementado o plano estratégico? Qual é o retorno esperado com as atividades propostas?

Q4: Um dos objetivos da Associação é expandir a sua atividade além-fronteiras. De que forma pretende chegar às Associações estrangeiras?

Q5: A Associação pretende também estreitar relações com a Comissão Europeia. Em que medida a contribuição ativa na Comissão Europeia é importante para a representação e imagem da Associação e competitividade das empresas Associadas?

Q6: Vivemos em plena Era Digital. Sente que é necessária uma transformação digital consistente e atual para dinamizar o método de trabalho na Associação?

Q7: Quais são as principais necessidades que a Associação enfrenta a nível de comunicação e marketing? E no digital, quais são os desafios?

Q8: Quais são os canais de comunicação offline e online que mais privilegia na relação com os stakeholders?

Q9: Considera relevante a presença da Associação nas redes sociais? Por que motivos?

Q10: De entre as diferentes redes sociais, qual considera ser a rede social indispensável à prossecução dos objetivos e atividade da Associação? Porquê?

Q11: Que tipo de campanhas de comunicação fizeram no passado? Existem dados mensuráveis? Qual o retorno esperado e qual foi o alcançado?

Q12: De que forma o lançamento de um novo website, criação de uma conta de Instagram e gestão adequada das restantes redes sociais, poderá envolver as pessoas na temática das Empresas Familiares?

Q13: Notou alguma evolução e/ou melhoria na comunicação interna e externa nestes últimos 6 meses? Se sim, de que forma contribuiu para melhorar o seu trabalho e a atuação da Associação na sociedade (relação com o público-geral)?

3. Portuguese Family Businesses Association (AEF)

Figure 17. The Areas of Activity of AEF (Adapted from AEF's Website, 2018).

Figure 18. The Activity vectors of AEF (Adapted from one of AEF's Presentations).

4. AEF's Digital Marketing Plan

a. Important Concepts to Retain

1. Digital Marketing

Digital marketing is aimed at promoting an organization, product, service, brand or person through online means. It is one of the main ways that organizations currently must communicate with the public directly, personally and at the right time.

AEF must increase its network, strengthening its brand and gaining visibility and notoriety.

Advantages of Digital Marketing:

a) **Easier and faster disclosure and accessibility**.

The availability of online information can be done from any place and at any time, facilitating the process.

b) **Greater ease in reaching large numbers of people**.

Due to the widespread access of electronic devices, the number of people online at the same time is very high, which allows reaching a wider audience easily from a publication.

c) **Possibility of reaching different audiences**.

The information is available and accessible on the Internet and can be consulted by whomever it wishes, reaching different audiences, who may be non-affiliated, in the case of AEF, but who visit the page or social network for interest in news or a statement of the President Mr. Peter Villax, for example.

2. Content Marketing

“***Content is the king***”. This sentence continues to make sense nowadays and this is one of the concepts that should always guide the presence of AEF in the online platforms.

All that is consumed daily on the Internet is content (blog articles, Instagram photos, YouTube videos, and many other actions). Content must be at the heart of an integrated digital strategy as a way of generating greater value for a company.

Content marketing is about producing highly relevant content or having a very positive impact on the audience as a way to help clarify doubts, attract potential members or simply make AEF an authority on a particular topic.

The better the content that the Association produces, the greater will be the perception of its audience that it is an authority in what it speaks and produces.

If AEF regularly produces useful content, these will generate organic (unpaid) quality links to the site but will also have a positive impact on attracting traffic through social networks.

On the other hand, by investing heavily in content marketing, it will enable AEF to gain greater trust from prospective Associates, so that by the time they have to make the decision to move forward, they will surely remember AEF. It will also create a greater level of interaction with its followers, increasing their notoriety.

In short, we can say that content marketing allows AEF to build, over time, a foundation of faithful followers of its work.

The process of doing Content Marketing follows three fundamental steps: determination, focus and attention. This implies:

- Plan content in advance;

- Define the objectives for each of these contents. It is not enough to produce a text, publish a video or make a post. It is necessary to see how the message is amplified so that it reaches as many people as possible;
- Define the keyword that characterizes the content;
- Consistency in the periodicity in which content is offered because it creates routine with followers. The AEF should choose the frequency with which to give content and should not fail;
- Diversify the themes.

3. Social Media

Social networks are no longer merely playful spaces to be an important presence of companies in communicating with their target audience.

They are now used as the main means of communication when the objective is to consume information. As such, the AEF must work on its social media content (on the front will be indicated where it should be present) consistently.

Social networks have a very large number of users, which makes it easy for many people to reach it. In addition, sharing on these platforms is very easy to do and, if done in an attractive way, can get many reactions.

4. Website

It is important that the AEF website is intuitive, that is, it should be as clear and simple as possible and easy to navigate, where the most varied information of relevant interest to the audience is made available.

5. E-mail

E-mail is an important tool to keep AEF's link with its Members active. Through this tool, it is possible to disseminate news, achievements, events, in a more personal and personalized way, which is important so that the Member does not feel just another number or another email in a database.

An e-mail signature should be created with the AEF logo in small dimensions that redirects to the site and should include icons for the social networks: Facebook, LinkedIn, Instagram, Twitter and YouTube. The image of the signature will vary according to the event that will be held by the Association (such as a Congress or the Annual General Meeting).

Figure 22. The Communication flow (Own elaboration).

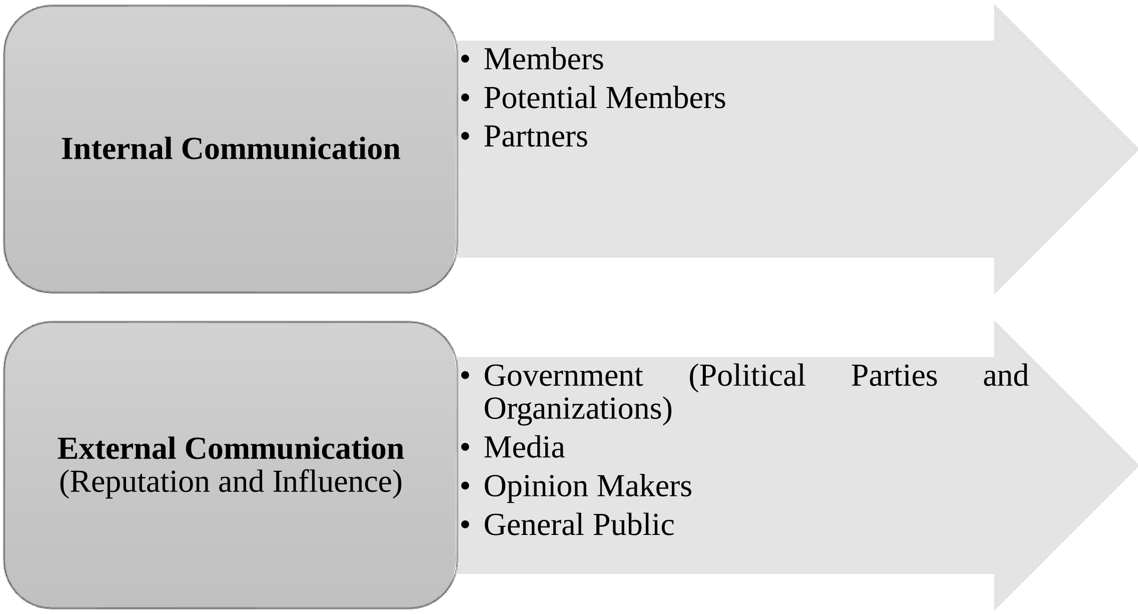

Figure 23. The Portuguese Family Businesses Association Logo (Adapted from AEF's Website).

EMPRESAS FAMILIARES
Associação das Empresas Familiares
Portuguese Family Businesses

Figure 26. The example of Image for a post with the model to follow (Own elaboration).

Figure 27. The example of a Video for the YouTube channel with the AEF's Logo (Own elaboration).

Figure 28. The homepage overview of the old AEF's Website (Adapted from AEF's old website).

Figure 29. The homepage overview of the new AEF's Website (Adapted from AEF's new website).

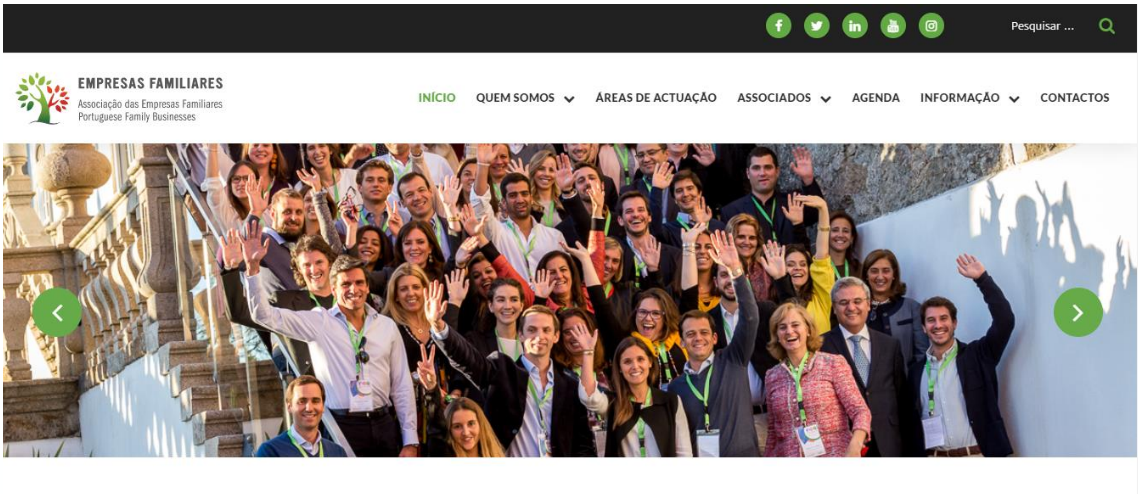

Figure 30. The proposal for the Organogram of the New Website (Own elaboration).

AEF Homepage						
Quem Somos	**Áreas de Actuação**	**Associados**	**Área Privada (com password)**	**Agenda & Eventos**	**Informação**	**Contactos**
Quem somos (Associação + definição de Empresas Familiares) **Mensagem do Presidente** **Órgãos Sociais Equipa** **Estatutos** **Galeria de Imagens (curta)**	Serviços AEF Acção - Nacional - Internacional	Associe-se: - Vantagens de ser associado - Download da proposta de adesão Associados Efectivos (só explicação) Associados Assistentes	Lista Empresas Associados > clicando no nome da Empresa surge uma página (pop-up) com uma sinopse (2/3 parágrafos), logo e url de site. Pedido de contacto Associados > Nome do Associado que quer contactar > razão > a página envia este pedido por email à Associação. Emprego - Oferta - Oportunidades	Agenda Eventos (o que aconteceu)	Notícias Alertas (Associados Assistentes) Newsletter (botão de subscrição) Documentos - Apresentação Associação - NIL - FAQ - *Press kit*	E-mails Morada

Figure 31. The Facebook Page of AEF (Adapted from AEF's Facebook).

Figure 32. The Post Example on Facebook (Own elaboration).

Figure 33. The Company Page of AEF on LinkedIn (Adapted from AEF's LinkedIn).

Figure 34. The Post Example on LinkedIn (Own elaboration).

Figure 35. The Twitter Account of AEF (Adapted from AEF's Twitter).

Figure 36. The Instagram Account of AEF (Adapted from AEF's Instagram).

Figure 37. The Stories Examples on Instagram (Own elaboration).

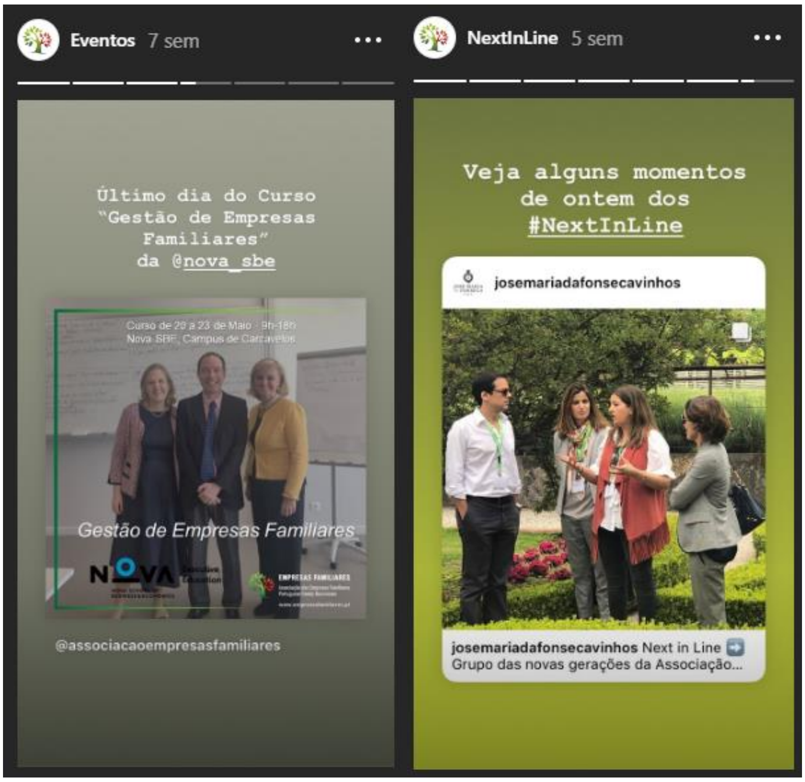

Figure 38. The YouTube Channel of AEF (Adapted from AEF's YouTube).

Figure 39. The example of a Post with an Influencer (Own elaboration).

Figure 40. The profile photo of all social networks during the Congress (Own elaboration).

Figure 41. The micro-site for the 2018 Family Businesses Congress (Adapted from Family Businesses Congress Website).

Figure 42. The Facebook Event (Own elaboration).

Figure 43. The speaker disclosure Post (Own elaboration).

Figure 44. The speakers' panel Post (Own elaboration).

Figure 45. The Facebook Live Interview with Speakers (Adapted from AEF's Facebook).

Figure 46. The 2018 Congress Best Moments Video (Adapted from AEF's YouTube Channel).

Figure 47. The acknowledgment Post (Own elaboration).

5. Project Conclusions

Figure 48. The growth of the number of Likes and Followers on Facebook (Adapted from AEF's Facebook Statistics).

Figure 49. The statistics of the Event on Facebook (Adapted from AEF's Facebook).

Figure 50. The Post of the President's Interview for Expresso (Adapted from Expresso's Facebook).