

FY23 REGION/CVB MARKETING PLAN USER GUIDE

IN WEBGRANTS

Log on to <https://funding.mt.gov/index.do>

Once the Marketing Plan has been created using Funding Opportunities, Click **'My Applications'** to access your marketing plan.

Click the **FY23 Marketing Plan** (Project Title) to open the marketing plan for editing.

Current Applications					Archived Applications		
ID	Status	Stage	Project Title	Funding Opportunities	Program Area	Deadline	
118620	Editing	Final Application	DMO Test Plan	118486	FY23 DMO Plan	DOC Office of Tourism	
						05/04/2022	

MARKETING PLAN APPLICATION FORMS

Application Forms		Application Details Submit Withdraw	
Form Name	Complete?	Last Edited	
General Information	✓	01/26/2022	
DMO Plan Narrative			
Objectives and Metrics			
DMO Budget			
Narrative Evaluation			
Reg/CVB Required Documents			

There are five forms that will be used to complete your marketing plan.

1. **DMO Plan Narrative** – answer the 4 questions asked in the Regulations
2. **Objectives and Metrics** – add your 3-5 objectives with measurable metrics
3. **DMO Budget** – post budgeted amounts for each of the 15 methods used
4. **Narrative Evaluation** – provide a narrative description of objectives and metrics.
Did you meet your goals? Used for FYE evaluation reporting
5. **Reg/CVB Required documents** – attach the motion approving DMO plan by governing board, Certificate of Compliance and current bylaws. These must be included with your DMO plan

The **General Information** form contains contact information and is marked complete because this information was provided when the marketing plan was created.

After saving information entered into plan text boxes a message may appear as a reminder to **Save** information. It's a courtesy message and can be disregarded if your information has been saved.

Leave site?

Changes you made may not be saved.

1. DMO PLAN NARRATIVE

Click 'DMO Plan Narrative'

Application Forms		Application Details Submit Withdraw	
Form Name	Complete?	Last Edited	
General Information			
DMO Plan Narrative	✓	01/26/2022	
Objectives and Metrics			
DMO Budget			
Narrative Evaluation			
Reg/CVB Required Documents			

Click 'Edit'

Menu Help Log Out	Back Print Add Delete Edit Save
Application	
Application: 118620 - DMO Test Plan	
Program Area: DOC Office of Tourism	
Funding Opportunities: 118486 - FY23 DMO Plan	
Application Deadline: 05/04/2022	
DMO Plan Narrative	Mark as Complete Go to Application Forms

Complete each text box with information as required in Section 5.4 of the January 2022 Regulations & Procedures

5.1 DMO PLAN NARRATIVE

Use the online application to complete your DMO plan narrative, budget chart and evaluation information, addressing the following topics and questions. Please refer to the DMO Handbook for guidance.

1. Describe your destination (who you are, who you wish to attract and why would they come) addressing your strengths, opportunities, and potential challenges.
2. Briefly describe how your destination aligns with the Montana brand.
3. What is the strategic role of your organization? (DMO strategy, select all that apply: Destination Marketing, Destination Management, Destination Stewardship, Destination Development).

Based on the strategic role you serve to your destination, provide the following information:

- a. Define your audience(s) (demographic, geographic and psycho-

- graphic)
- b. What research supports your DMO strategy?
- c. What are your emerging markets?
- 4. Define and describe your overall goals. A goal is an idea of the future or desired result that a person or group of people envisions, plans and commits to achieve.
 - a. Describe proposed tactics and projects as related to overall goals and controlled by the organization in its financial statements.

Click **‘Save’** when done. Information can be saved then edited at a later time.

Application: 118620 - DMO Test Plan
 Program Area: DOC Office of Tourism
 Funding Opportunities: 118486 - FY23 DMO Plan
 Application Deadline: 05/04/2022

DMO Plan Narrative
1. Describe Your Destination
 Describe your destination (who you are, who you wish to attract and why they would come) addressing your strengths, opportunities, and potential challenges.

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‘Mark as Complete’ when all information is included in the Component.

Application: 118620 - DMO Test Plan
 Program Area: DOC Office of Tourism
 Funding Opportunities: 118486 - FY23 DMO Plan
 Application Deadline: 05/04/2022

DMO Plan Narrative [Mark as Complete](#) | [Go to Application Forms](#)

All components must be ‘Mark(ed) as Complete’ before Plan can be submitted for review.

Application Forms		Application Details Submit Withdraw	
Form Name	Complete?	Last Edited	
General Information	✓	01/26/2022	
DMO Plan Narrative			
Objectives and Metrics			
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2. OBJECTIVES AND METRICS

Click **'Objectives and Metrics'** to input the required information. Include 3-5 objectives that are measurable and the metric for measurement.

Application Forms		Application Details Submit Withdraw	
Form Name	Complete?	Last Edited	
General Information	✓	01/26/2022	
DMO Plan Narrative			
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DMO Budget			
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Reg/CVB Required Documents			

Click the **'Add'** button for the addition of a new Objective and Metric.

Menu | Help | Log Out
Back | Print | **Add** | Delete | Edit | Save

Application

Application: 118620 - DMO Test Plan

Program Area: DOC Office of Tourism

Funding Opportunities: 118486 - FY23 DMO Plan

Application Deadline: 05/04/2022

Instructions

Click "Add" to enter the Objective.

Objectives/Metrics/Evaluation [Mark as Complete](#) | [Go to Application Forms](#)

Objectives	Measurable Metrics for Success	Report the Metric Achieved	Evaluation of Measurable Metrics for Success
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Last Edited By:

Text is required in the 'Objectives' and 'Measurable Metrics for Success' fields. The 'Report the Metric Achieved' and 'Evaluation of Measurable Metrics for Success' text boxes will be completed when the objective is achieved or following FYE and prior to deadline.

Click **'Save'** when done. Information can be saved then edited at a later time.

'Mark as Complete' when finished.

3. DMO BUDGET

Application Forms		Application Details Submit Withdraw	
Form Name	Complete?	Last Edited	
General Information	✓	01/26/2022	
DMO Plan Narrative			
Objectives and Metrics			
DMO Budget			
Narrative Evaluation			
Reg/CVB Required Documents			

Click 'DMO Budget' to open the budget component.

Application: 118620 - DMO Test Plan

Program Area: DOC Office of Tourism
 Funding Opportunities: 118486 - FY23 DMO Plan
 Application Deadline: 05/04/2022

Instructions
 Click "Add" to enter the DMO Method Budget amount(s).

DMO Budget [Mark as Complete](#) | [Go to Application Forms](#)

Allowable Methods	Amount Budgeted	% of Budget Allocated	Amount Expended	% of Budget Expended
	\$0.00	0.00	\$0.00	0.00

Last Edited By:

The Budget component has a dropdown list of 15 'Allowable Methods'. Choose all the methods that are applicable to your Goals/Objectives/Metrics.

Application: 118620 - DMO Test Plan

Program Area: DOC Office of Tourism
 Funding Opportunities: 118486 - FY23 DMO Plan
 Application Deadline: 05/04/2022

Instructions
 Click "Add" to enter the DMO Method Budget amount(s).

DMO Budget

Allowable Methods*
 Amount Budgeted*
 Sub-Total
 % of Budget Allocated*
 Amount Expended*
 % of Budget Expended

- Administration
- Joint Venture
- Opportunity Marketing
- Cooperative Marketing
- Marketing Personnel
- Agency Services
- Marketing Resources
- Paid Media
- Earned Media/Tourism Sales
- Website Development (Online, Website, Mobile)
- Education/Outreach
- Travel/Trade Shows
- Research
- Product Development
- Visitor Services

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Choose the appropriate **'Allowable Method'** and provide the Amount Budgeted. The 'Amount Expended' and '% of Budget Expended' text boxes will be completed at FYE.

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Instructions
 Click "Add" to enter the DMO Method Budget amount(s).

DMO Budget

Allowable Methods*

Amount Budgeted* \$0.00

Sub-Total

% of Budget Allocated*

Amount Expended* \$0.00

% of Budget Expended

Click **'Save'**.

Follow the steps above for each Allowable Method being used in the DMO Plan.

Allowable Methods that have been added can be edited by clicking the blue colored Allowable Method name.

DMO Budget		Mark as Complete Go to Application Forms			
Allowable Methods	Amount Budgeted	% of Budget Allocated	Amount Expended	% of Budget Expended	
Administration	\$2,000.00	20.0	\$0.00	0	
	\$2,000.00	20.00	\$0.00	0.00	
	\$2,000.00	20.00	\$0.00	0.00	

Last Edited By: DMO DMO, 02/08/2022

4. NARRATIVE EVALUATION - this component will be completed at fiscal-year-end. Provide a narrative evaluating the goals/objectives/metrics in the plan.

Application

Application: 118620 - DMO Test Plan

Program Area: DOC Office of Tourism

Funding Opportunities: 118486 - FY23 DMO Plan

Application Deadline: 05/04/2022

Requested Total: \$0.00

Narrative Evaluation

Font Family | Font Size | **B** | *I* | U | [List Icons] | [Link Icon] | [Image Icon] | [Table Icon] | [Text Color Icon] | [Background Color Icon] | [Undo Icon] | [Redo Icon]

Path: p | Words: 0

'Mark as Complete' when finished.

Application

Application: 118620 - DMO Test Plan

Program Area: DOC Office of Tourism

Funding Opportunities: 118486 - FY23 DMO Plan

Application Deadline: 05/04/2022

Requested Total: \$0.00

Narrative Evaluation

[Mark as Complete](#) | [Go to Application Forms](#)

Last Edited By:

5. REG/CVB REQUIRED DOCUMENTS

This link is where the documents that are required to be submitted with the annual marketing plan are uploaded. They include the motion approving the DMO Plan by the governing body, Certificate of Compliance, and copy of current bylaws.

Menu | Help | Log Out | Back | Print | Add | Delete | Edit | Save

Application

Application: 118620 - DMO Test Plan

Program Area: DOC Office of Tourism

Funding Opportunities: 118486 - FY23 DMO Plan

Application Deadline: 05/04/2022

Requested Total: \$0.00

Instructions

Download and Complete the Required Documents to be submitted with your Marketing Plan.

[Click here to start download.](#)

Click "Add" to attach your completed documents.

Reg/CVB Required Documents

Description	File Name	File Size	Date Uploaded	Delete?
Mark as Complete Go to Application Forms				

Last Edited By:

Click **'Add'** to attach each document. Mark as Complete when finished.

SUBMIT MARKETING PLAN FOR REVIEW & APPROVAL

Each Application Form must be **marked as complete** before the DMO plan can be submitted for review and approval by the council.

Once all forms are marked as complete, submit your DMO plan by clicking the ‘**Submit**’ button on the Applications Forms page.

Application Forms		Application Details Submit Withdraw	
Form Name	Complete?	Last Edited	
General Information	✓	01/26/2022	
DMO Plan Narrative			
Objectives and Metrics			
DMO Budget		02/08/2022	
Narrative Evaluation			
Reg/CVB Required Documents			