

Are We There Yet?



***A Hands-On,
Minds-On Guide***
to Developing a Strategic
Communications Plan



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Creating a Strategic Communications Plan: A Road Map to Impact



Social change activists, nonprofit and government leaders, and all of us seeking to make change in the world increasingly see communications as a critical aspect of our work. Connecting with the audiences or stakeholders we wish to engage or influence is central to any change effort. But given limited resources, how do we best organize our outreach? How do we decide whether to pursue media or social media outreach, create a new website or blog, develop various print or electronic materials, or take on any number of communications tactics?

A thoughtful, “hands-on, minds-on” approach to strategic communications can help. This work can dramatically amplify the impact of your best ideas, programs or services. A strategic communications plan:

- Creates a razor-sharp sense of what you want to accomplish with your communications efforts;
- Ensures that the investments you make in communications are focused on objectives you and your organization really care about; and
- Provides a mechanism for assessing the impact of your communications and a much clearer sense of the value of this kind of work.

In this guide, we’ve outlined seven steps to get you on the road to creating an effective—and strategic—communications plan. Follow it, and you’re on your way to making change.

Things to remember as you complete the guide:

- Communications planning is a “team sport.” You likely can’t go it alone. You will need help. Be sure to bounce your ideas off others working on the project at each step of the planning process.

- Remember that implementing the plan may not be a linear process. You may find yourself having to go back to an earlier step to address new learnings or changes in your situation. For example, you may begin your planning with senior management in your organization as a primary audience. But, a few months into your work, there is a major reorganization, and your audience needs to shift. You’ll want to revisit the various steps of your plan to ensure your efforts remain relevant.
- Don’t rush, but don’t wait. Be sure to set aside adequate time to consider, even reconsider, each step of the planning process.

Each of the seven steps has a “Hands-on, Minds-on” worksheet to help you begin to draft your communications plan.

Let’s get started!

Strategic communications is “the purposeful use of communications by an organization to achieve its mission.”

– Kirk Hallahan,
Professor,
Colorado State
University

What Does Success Look Like?

Setting Clear Goals and Objectives



The first step in developing a strategic communications plan is to concentrate on setting out a communications goal and one or two (certainly no more than three) specific objectives connected to this goal.

It is important to keep in mind that your communications goal and associated objectives are not the same as your program goals and objectives. For example, the program goal of a AgeUp, a (fictional) advocacy group, is to work with policymakers and stakeholders to reauthorize the Older Americans Act. The group's communications goal is to disseminate recommendations on ways to update the Act to better support older adults. Supporting that goal, one communications objective could be: In the next six months, educate at least 50 legislators serving on key Congressional authorizing committees about how the Act can better support older adults' health, well-being, and ability to age well at home and in the community.

Compared to your goals, your communications objectives should be much more detailed. They should be SMART: specific, measurable, attainable, relevant, and time-bounded.

The following questions may help as you think about developing your objectives.

- What does success look like? What do you hope your communications and outreach efforts will achieve?
- What will be different as a result of your communications?
- Who exactly will be affected by your communications efforts? (For example, the general public is too broad.)

- How will these efforts change your target audience's awareness, knowledge, attitudes or behaviors about the issue/program/service you are talking about?
- By when will this change take place?
- How will you know that you are successful?

REMEMBER! Your communications objectives should be specific, measurable, attainable and relevant, and have an associated time frame.

PLANNING IN ACTION

- **Communications Goal**
To educate primary care physicians about advance directives.
 - **Clear and Measurable Communications Objective**
By September, educate 50% of all primary care physicians in Florida about advance directives in order to increase the number of seriously ill patients who complete an advance directive by 25%.
- **Communications Goal**
To advance evidence-based health promotion programs around the country.
 - **Clear and Measurable Communications Objective**
By September, convince 12 key legislators on the House and Senate health committees to support pending legislation to expand prevention and Chronic Disease Self-Management programs for older adults.

HANDS-ON: STEP 1

On the worksheet provided, write down your overall communications goal and your specific and measurable objectives.



Setting Clear Goals and Objectives



WORKSHEET

What is the overall goal of your communications?

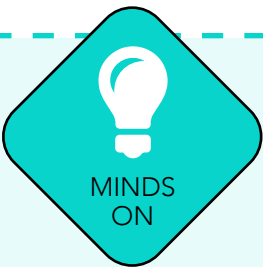
Remember, this is likely different from the overall goal of your program.

What are your primary, measurable communications objectives? (Whom do you need to reach, with what information, by when, with what outcome?) Make sure these are clear and action-oriented.

1.

2.

3.



- What do you hope to accomplish?
- What will be different as a result of your communications?
- Are your objectives measurable?
- Do you have a time frame?
- Have you considered resource constraints?
Does this feel realistic or attainable?

NOTE: From this point forward, you should choose a single objective from the list above and proceed through the rest of the strategic planning worksheets with that objective in mind. When you're finished, return to this list and go through all of the exercises for each separate objective.

What's Going On Out There?

Conducting an Environmental Assessment



Communications never happens in a vacuum. Your efforts will compete with other information and ideas for the attention of your audience. Now that you have your goal and objectives defined, the next step in developing your communications plan is to assess the communications environment—both externally and internally.

External

- What is happening in the broader world that may influence how people view your work? Are there popular trends or stories that are connected to your issue or program?
- How is your current work/role perceived by the broader community?
- What, if any, competition is out there? What other similar programs and services are vying for your audiences' attention?

Internal

- What is going on in and around your organization that may affect your initiative?
- Are there other projects and events that are generating excitement? Could these be influenced to support your objective?
- Are there competing ideas or projects that may distract your audience from your priorities?

Getting a clear handle on these and related issues can help ground your planning in helpful ways.

PLANNING IN ACTION

In 2021, the U.S. was facing a growing number of confirmed cases of the mpox virus. In early August of that same year, the Biden administration declared the mpox outbreak to be a public health emergency and sought to enact more aggressive measures to curb the spread of the disease. Very quickly, misinformation, including how the disease is spread and who is at risk of infection, began to spread online. If you were leading a public health campaign to increase the number of people getting tested for mpox, you would need to take a look at your communications efforts and re-work them to address misperceptions created as a result of misinformation.

Internal factors in your organization are no less important to consider. Leadership changes, shifts in funding, employee turnover, internal policy—all of these can positively or negatively impact your communications efforts. In the example above, a local public health organization is working to increase testing rates for mpox, which means educating the public on the signs and symptoms of the virus. The organization had spent the previous few years investing their resources in combatting the Covid-19 pandemic. As a result, the organization was able to leverage their existing community partnerships and communication channels to quickly pivot messaging to include information about mpox.



HANDS-ON: STEP 2

On the worksheet provided, write down all the relevant internal and external factors that might impact your communications efforts.

Conducting an Environmental Assessment



WORKSHEET

What is going on in the environment that might have a **positive** impact on your communications efforts?

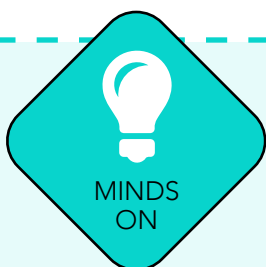
List the factors inside your organization that would **help** your work:

List the ideas or trends outside your organization that would **help** your work:

What is going on in the environment that might have a **negative** impact on your communications efforts?

List the factors inside your organization that would **hinder** your work:

List the ideas or trends outside your organization that would **hinder** your work:



- What are the ideas in good standing?
- What is the hot news?
- What are people worried about/excited about?
- What is going on nationally/regionally that might affect your more local communications effort?

Who Are We Talking To?

Learning More About Your Audience/Stakeholders



The next step in developing your communications plan is to identify, prioritize, and get to know your target audience or audiences. This step is critical, yet it is often taken for granted. In order to achieve your objectives, to whom do you need to speak or communicate? Often, the answer is relatively clear from your objectives, but it is important to define the audience as precisely as possible.

With your list of audiences in hand, identify which are the most important. Remember, we all have limited resources for communications. You must prioritize. If you hope to achieve your objective(s), which one or two audiences are most critical? Which will have the most powerful impact on your ultimate goal? Be discriminating.

Once your list is pared down, try to understand each audience. What are their biases and backgrounds? What are their values? Who influences them? Where do they get their information? Importantly, how do they perceive you or your issue? Are there other related issues that they are interested in? Are they ready to hear what you have to say?

If you are seeking to influence a single stakeholder or a small group of stakeholders (e.g., decision makers), you may want to take a page from Alex Osterwalder's excellent Value Proposition Design and try to understand their:

- **Jobs**—What they do each day, what they are responsible for;
- **Pains**—What a bad outcome or concern looks like; and
- **Gains**—What success looks like to them.

This kind of stakeholder profile can help you understand what your program or service might mean to this person or group and allow you to shape your messaging and tactics accordingly.

If you do not know the answer to these kinds of audience or stakeholder analysis questions, chances are you may need to do some additional research before you finish your plan.

REMEMBER! *With limited resources, we have to prioritize.*

PLANNING IN ACTION

“Organizational leadership in our health system” might be your audience. But are you referring to multiple layers of leadership or really just the C-suite? Maybe you are just talking about the managers of a particular hospital or clinic or perhaps simply a single decision maker.

“State Medicaid officials” might be an audience you identify. But do you really mean all Medicaid officials? Do you really mean their policy staff? Or perhaps you simply mean the Medicaid chief?



HANDS-ON: STEP 3

On the worksheet provided, list your primary audience(s).

Learning More About Your Audience/Stakeholders

WORKSHEET



HANDS
ON

Who are your primary audiences—the people with whom you are most interested in communicating? Think specifically: for example, hospitals' is likely too general. Focusing on a smaller segment of this audience, like 'discharge planners at referral hospitals,' is better.

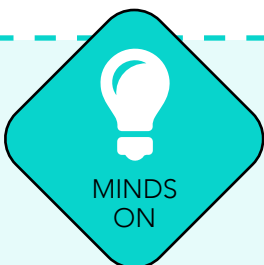
Below, list your primary audience(s), what they know about your issue/program/service, what they most care about, and how they get their information. If you don't know the answers, how will you get them?

Priority Audience for Objective #1:

- What do audience members know about your idea/program/service?
- What do they care about?
- How do they prefer to get their information?
- If you are trying to target a specific stakeholder or decision maker, what are his or her jobs, pains, and gains?

Priority Audience for Objective #2:

- What do audience members know about your idea/program/service?
- What do they care about?
- How do they prefer to get their information?
- If you are trying to target a specific stakeholder or decision maker, what are his or her jobs, pains, and gains?



MINDS
ON

- What does your audience care about?
- Who influences audience members?
- Where do they get their news and information?
- Whom do they listen to?
- What do they think about your issue?
- What do they think about you?
- Are they in a position to act on your message?
- What are their jobs, pains, and gains?

What Do We Say?

Developing Sharp, Compelling Messages



Now that you've defined your objectives, assessed the environment, and identified your audience(s), it is time to create your messaging. A message is a statement that describes what a program, service or initiative is, does or, most importantly, stands for. A message or set of messages serves as a critical building block for all of the communications tactics you ultimately use (e.g., speeches, testimony, presentations, campaigns, media outreach, and social media).

Creating an effective message can be a challenge, but it's important to take the time to get it right. If you don't boil your message down into a concise yet meaningful statement, someone else will and, chances are, they will get it wrong.

Think about your objectives and audiences. What is it that you want to say to these audiences to convince them, to move them to action in the service of your objectives? What is the most important thing this audience needs to know?

Why should this be important to audience members? What should they do once they hear your message? Why is it urgent?

Some things to keep in mind:

- Think like a beginner: Most people won't know nearly as much about your idea/issue/project as you do.
- Avoid jargon: Language that is likely only understood by people in your office or in the field can confuse your audience. Imagine you're at a family reunion talking about your project. Will your cousin understand what you're talking about?
- Simple is better: Don't pull ancillary details into the mix, or your main message will be lost.

- Speak from the head and the heart: People will remember you and your message if you are smart, thoughtful and genuine. Make sure you include the "so what?"— the why your audience should care.
- Strive to create "sticky" messages: Messages that resonate with the audience and are more likely to stay with them. Concrete language, metaphors and other poetic devices like rhythm and rhyme can help people remember your message more easily.

In crafting your message, it is helpful to develop an overarching idea or general message, appropriate for many or all audiences. Then, you can add more specific messages needed to influence particular groups.

PLANNING IN ACTION

Overarching Idea or Message
The OPTIMISTIC program enhances the lives of long-stay nursing home residents by implementing evidence-based strategies that prevent unnecessary trips to the hospital and improve treatment of pain and other medical conditions.

Specific Message to C-Suite or ACO Leaders
The OPTIMISTIC program will dramatically improve the quality of care in nursing/long-term care facilities in your network, reduce per patient per month costs, and help you avoid financial penalties with hospital readmissions.

HANDS-ON: STEP 4
On the worksheet provided, begin drafting your messages. You should have an overarching message and specific messages for separate audiences.

Developing Sharp, Compelling Messages

WORKSHEET



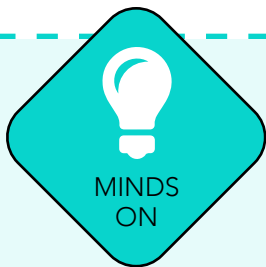
What is the **Value** driving your idea?

What's the **Problem**?

What's the **Cause**?

What's the **Answer**?

What are the **Net Benefits**? What are the alternatives/opposing ideas? How is your answer better?



Review your message.

- Can it be shorter, simpler?
- Can it feel more surprising? Is there an unusual data point you might use?
- Can you use an example, analogy, or metaphor to make it more concrete?
- What's your evidence? Do you have 1-3 data points (qualitative or quantitative)?
- Can it connect with your audience's emotions, values, belief systems more effectively?
- Is it free of jargon?
- Is there a single, powerful story or example that brings this to life?
- Who can you test your message(s) on?
- Is there a compelling photo/image/graphic you can include?
- **BONUS:** Can you fit it into a 280-character X post?

Adapted from G. Richard Shell & M. Moussa, of The Art of Woo: Using Strategic Persuasion to Sell Your Ideas (Portfolio, 2007)

Is That Realistic?

Assessing Your Assets (and Their Limitations)

SCP



Before you start considering the tactics or vehicles you will use to achieve your objectives, it is important to do a reality check—an inventory of the resources you have at hand to accomplish your work.

Relationships

What are the relationships that you currently have with your target audience? Are they direct or indirect? Are they positive relationships or somewhat contentious? Do you know the key decision makers or staff people involved? Do you know their influencers? Have you worked with these leaders or their influencers before? Strong relationships and contacts are a critical communications asset. If you don't have these connections, it will likely require time and effort to establish them.

Knowledge/Skills

The ability to conduct effective communications requires staff expertise that is not always immediately available. What skill sets are easily accessible? Do you have the capacity to outsource work like developing print materials or creating a website? Do you have the ability to engage your audience through social media or do community outreach?

Budget/Time

Communications planning is about the art of the possible. What kind of budget do you have on hand to conduct your communications effort? Just as important, do you and/or your staff have the time necessary to conduct or even oversee your communications activities?

PLANNING IN ACTION

The (fictional) Family Care Foundation is launching a campaign aimed at raising federal policymakers' awareness that family members caring for patients with dementia need services. It has clarified its objectives, conducted a thorough assessment of its audience and the environment, and created messages for the campaign. Through this process, it has determined that social media and the foundation's blog will need to be significant elements of its campaign. However, there is only one staff member who is comfortable using social media, and she does not have the time to post on behalf of the foundation every day. Several people on staff have written blog posts in the past, but they are too swamped to do this on a regular basis. In order to conduct these activities effectively, the foundation will have to look for alternatives. For example, it might provide social media training to all staff and create a schedule of posts so that no one person is responsible for all posting. It could also hire a consultant to help draft some of the blog posts, thus lightening the load on the staff members.

You will need realistic insight on the current state of your organization and a smart assessment of your team's talents and the roadblocks that could slow you down.



HANDS-ON: STEP 5

On the worksheet provided, write down all the assets you can bring to bear on your communications efforts. Don't forget to consider the limitations inherent in some of those, too.

Assessing Your Assets

WORKSHEET



HANDS
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Who/what are your communications assets in terms of:

- Staff expertise
- Staff time
- External resources
- Budget
- Existing relationships
- Needed relationships

What will you do to address any limitations?



MINDS
ON

- Consider the relationships critical to your communications efforts. Are they positive? Negative? Strong? Weak?
- What partnerships might you have to develop in order to succeed?
- Is your budget/time allocation realistic?
- Be sure to note the assets you have on hand as well as those you need to build.

So, What Should We Do?

Getting the Marketing Mix Right



The next step in developing your communications plan is to think about how to get your message to your audience(s). There is generally a wide range of tactics or “vehicles” to choose from. Tactics can include one-on-one conversations, small group presentations, community meetings and events, infographics, speeches, academic articles, emails, newsletters, websites, op-eds and letters to the editor in the local media or in other publications, and more general media outreach as well. They can include new media—everything from a blog to a Facebook page or a YouTube channel. Other activities that physically or virtually convene your target audiences can serve as powerful tactics as well.

You can no doubt identify a plethora of useful ways to reach your audience. Getting the right mix of marketing or outreach approaches, however, is more challenging. Which vehicles are most clearly connected to or most influential with your target audiences? Which are most leveraged across audiences? Check the previous page. Do you have the assets on hand, the needed capacity to implement the tactic or group of tactics that might be useful?

“Providing messages in multiple formats increases accessibility, reinforces messages and gives people different ways to interact with your content based on their level of engagement and access to media.”

The Health Communicator’s
Social Media Toolkit,
CDC

PLANNING IN ACTION

The target audience for a pregnancy prevention project in downtown Detroit is low-income teenagers. The project’s director recently attended a workshop on using Facebook to promote social change and is pushing hard to create a Facebook page and an associated campaign for this project. After all, the ALS “Ice Bucket Challenge” was a huge success. But is Facebook the best way to reach the project’s target audience? Are there other social media or even more traditional tactics to consider, given what is known or learned about these young people and their communications habits?

Shelia, a staff member in a local Veterans Health Administration (VHA) office, wanted to engage 15-25 local community health organizations and create a new regional collaborative focused on diabetes prevention. But what was the best way to reach these groups? Email certainly seemed like the easiest and most cost-effective approach to start, but several of the first set of emails went unanswered. Some further audience research found that these community health organizations paid close attention to two state newsletters, attended an annual state public health meeting, and joined in part of a monthly public health call focused on physical activity and nutrition.

With her boss, a senior VHA administrator, as a liaison, Shelia connected with the state public health department and infused information about the collaborative into these and related communications channels. After two months of this awareness building, Shelia’s next set of emails elicited 12 volunteers for the collaborative, including two who helped to reach out to additional colleagues to get the group started.



HANDS-ON: STEP 6

On the worksheet provided, rate the tactics you think will work best for each of your audiences.

Getting the Marketing Mix Right

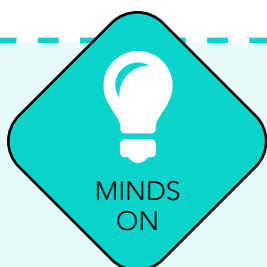


WORKSHEET

Consider the list below and rate each of the tactics in terms of relevance/usefulness for your project's priority audience(s) and communications objective(s). Add others to the list, as needed.

| Tactic | Influence on Audience <i>(Strong, Moderate, Weak)</i> | Asset on/at Hand <i>(Yes, No)</i> | Cost <i>(No, Low, High)</i> |
|---|--|--------------------------------------|--------------------------------|
| Face-to-face meetings | | | |
| Telephone calls | | | |
| Emails, e-newsletter | | | |
| Website/blog | | | |
| Report or white paper | | | |
| Symposium or conference | | | |
| Presentations, webinars, or trainings | | | |
| Grassroots mobilization | | | |
| Media event/outreach | | | |
| Op-eds, letters-to-the-editor, guest blog posts | | | |
| Social media tactics including a Facebook campaign, YouTube channel, X/Twitter engagement, LinkedIn outreach, and/or use of infographics and online video | | | |
| Internet or traditional advertising | | | |
| Promotional events (e.g., galas/community events) | | | |
| Printed materials and other promotional items | | | |
| Trainings, toolkits, educational activities | | | |
| Other tactics: | | | |

Now, select the 3-5 tactics that are MOST appropriate/feasible for you to implement in the next three to six months and give details about them. For example: Face-to-face meetings—Hold meetings with leaders of 10 hospital COOs; X/Twitter—meet with staff to plan for 2x/week X/Twitter posts and daily monitoring; Presentations—visit the Greater Care, Hands On, and Jefferson assisted living facilities and present overview of our services to nurse managers.



- Which tactics are strongest or most influential for each audience?
- Which can be used to reach multiple audiences?
- Do you have the assets on hand and the capacity to utilize the tactics you identify?

How Did Things Go?

Evaluating Your Efforts



You've defined your objectives, assessed the environment, prioritized your audiences, created a strong message, tallied your assets, and selected your tactics. Now, it's time to think about how you will evaluate the success of your communications plan.

Too often in communications, people do not assign sufficient rigor to evaluating what is working and how. Just as if you were testing some kind of program intervention or examining a new product launch, ask yourself, how will I know my communications efforts worked? Setting measurable objectives is an important first step.

Also important is matching the resources required to measure your progress with the scope and size of the project at hand. Randomized, double-blind studies to measure changes in attitudes or behaviors are probably not called for. Exhaustive qualitative evaluation may be overkill, as well. However, strategic, systematic, and low-impact data collection (e.g., through phone conversations, evaluations at meetings and brief email surveys) can provide both a baseline understanding of an audience's awareness or understanding of your work, as well as any changes in that understanding over time.

Evaluation of your progress should be an ongoing and iterative process, not just a one-time, final step of your project. Taking stock of how things are going along the way, and retooling when necessary, are smart and often necessary steps.

For example, let's say your initial audience analysis revealed that the best way to engage your target group, the executive directors of 12 community-based organizations, was by email and social media, particularly LinkedIn. After two months of this kind of outreach, however, you find through an interim assessment that you have only been able to connect with just two leaders of these groups. You can then

gather your communications team to identify what you have learned and to brainstorm better alternatives to achieve your objective.

REMEMBER! Evaluation of your progress should be an ongoing and iterative process, not just a one-time, final step of your project.

PLANNING IN ACTION

The GeriPal podcast, produced and hosted by geriatricians and palliative care specialists, sought to expand its national visibility and grow its listener base. One objective toward achieving this goal is to increase the number of listeners to podcast episodes by 50% over 3 months.

Additionally, the podcast producers gauge the number of downloads, likes, and comments on individual episodes. They also evaluate the qualitative value of engagement and track anecdotal reports of articles, speaking invitations and other in-person interactions generated by interest in specific podcast episodes among practice change leaders and policy makers.

By evaluating all these metrics regularly, GeriPal hosts are also able to see which posts generate more engagement and can adapt the blog's content to more closely meet the interests of its listeners.



HANDS-ON: STEP 7

On the worksheet provided, answer the questions that will help you develop an evaluation plan for your communications effort.

Evaluating Your Efforts



WORKSHEET

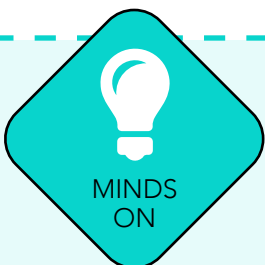
Evaluation budget:

Staffing (Who will gather data, conduct the evaluation?):

Key success metrics:

What kind of interim assessments will you conduct?

Additional tools and assets needed:



- Are the resources required to measure progress commensurate with your evaluation plan?
- Do you have a time frame established for your evaluation?
- What interim metrics will you use to assess your progress?



Books and Newsletters

- Free Range Thinking: A free, monthly online newsletter on public interest communications from The Goodman Center. www.thegoodmancenter.com/resources/newsletters
- Campbell, J. In the Trenches™. Storytelling in the Digital Age: A Guide for Nonprofits. Nashville: CharityChannel Press, 2017. Print.
- Heath, C. and Dan Heath. Made to Stick: Why Some Ideas Survive and Others Die. New York: Random House, 2007. Print.
- Leroux Miller, K. The Nonprofit Marketing Guide: High-Impact, Low-Cost Ways to Build Support for Your Good Cause. Hoboken: Wiley, 2nd Edition, 2021. Print.

Online Resources

- Frameworks Institute: A think tank that helps mission-driven organizations communicate about social issues in ways that build public will to support progressive change. www.frameworksinstitute.org
- "Gateway to Health Communication & Social Marketing Practice." CDC National Center for Health Marketing. Web. 22 July 2024. This is a very helpful resource to help build health communication or social marketing campaigns and programs. It includes tips for analyzing and segmenting an audience, choosing appropriate channels and tools, evaluating the success of your messages and campaigns, and much more. www.cdc.gov/healthcommunication/
- The Smart Chart is a free tool from Spitfire, designed to help mission-driven organizations create an actionable and effective communications plan. This is your blueprint for strategic communications success. www.smartchart.org/



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