



Strategic Communications Planning Worksheet

Seven Steps to Better Communications

1. Set clearly defined **Objectives**
2. Find out what is going on in the **Environment**
3. Identify, prioritize and get to know your **Audiences**
4. Create strong, clear **Messages**
5. Know your **Assets**...and their limitations
6. Develop leveraged, high-impact **Vehicles** (that take your messages to your audiences)
7. Design and implement **Evaluation** mechanisms



1. Set clearly defined Objectives.

Concentrate on setting out one or two (certainly no more than three) objectives for the challenge at hand. The following questions may help you think about these objectives.

- What do you hope your communications and dissemination efforts will achieve?
- What will be different as a result of your communications?
- How will it change people's awareness, knowledge, attitudes or behaviors about the issue you are talking about?

Once you have clearly defined an objective, try to refine it so that you can measure whether or not you have achieved it. Make it specific and make sure you include a time-frame in which you hope to accomplish your aim.

General objective

Promote evidence-based health promotion programs around the country.

Measurable objective

By September 2014, convince 12 key legislators on the House and Senate health committees to support legislation expanding prevention and Chronic Disease Self-Management programs for older adults.

Strategic Communications Objectives

1.

2.



2. Find out what is going on in the environment.

Communications never happens in a vacuum. Your efforts will compete with other information and ideas for the attention of your audience. So before you begin, take a look around. What is happening in the broader world that may influence how people view your work? What is going on in and around your office or placement or issue that may affect your initiative? Are there other projects, events, movements that are generating excitement. Could these be influenced to support your objective? Are there elements of the political schedule that will affect the work you are doing? Are there budget or resource decisions that will affect your capacity to take on this effort? Getting a clear handle on these and related issues can help ground your planning in helpful ways.

Key elements of your External view of the environment

Key elements of your Internal view of the environment



3. Identify, prioritize and get to know your Audiences

In order to achieve your objectives, to whom do you need to speak or communicate? Often, this is relatively clear from the objectives, but make an effort to define the audience as precisely as possible. For example, 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 simply the Medicaid chief?

Once you have your list of audiences, which are the most important? Remember your limited resources. You must prioritize. If you hope to achieve your objective(s), which audiences are most critical? Which will have the most powerful impact on your ultimate goal? Be discriminating.

When your list is pared down, then try to understand your audiences. 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? If you do not know the answer to these kinds of questions, chances are you should do some additional research before you finish your plan.

Key audiences and how they perceive your project or issue.

1.

2.

3.

4. Create strong, clear Messages

A message is a statement that describes what a person or organization is, does or, most importantly, believes. A message or set of messages can serve as a building block for all of your communications (e.g., speeches, testimony, presentations, even work with the media.).

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? It is often helpful to develop an overarching message, appropriate for many or all audiences. Then, you can add sub-messages needed to influence particular groups. For example:

Overarching message

Aging research is critical to developing the knowledge we all need to live healthier, longer lives.

Specific message to elected officials

Pay now, not later.

Supporting aging research is a sound investment. The cost of research today is modest compared to the huge cost-savings this research will yield in the future.

Finally, if possible, test these messages with sub-sets of your target audience. This could include formal interviews or focus groups, but using the messages in informal conversations or social/professional settings where you may be interacting with people who represent your audience, can give you some feedback on whether the language resonates and whether it has a chance of educating or influencing your intended audiences.

Overarching message

Audience-specific message 1

Audience-specific message 2

5. Know Your Assets

Before you start considering the tactics or vehicles you will use to take your message to your audience in the service of 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 have currently with your target audience? Are they direct or more indirect? Are they positive relationships or more contentious? Do you know the key staff people involved or have you worked with media and social media around our issue? 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 out-source work like developing a Web site or conducting social medial outreach?

Budget/Time

In doing any kind of communications planning, it is critical to be realistic. What kind of dollars do you have on hand to conduct your communications effort. Just as importantly, do you and/or your staff have the time necessary to oversee or even conduct your communications activities?

The key communications assets I have at hand are:

The communications assets I think I need to build are:

6. Develop leveraged, high-impact Vehicles

Communications vehicles represent a wide range of mechanisms to carry your messages to your audiences. Vehicles can include one-on-one conversations, small group presentations, speeches, academic articles, e-mails, newsletters, Web sites, 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 new Facebook page to a Twitter campaign. Meetings, symposia and other activities that physically or even virtually convene your target audiences can also be powerful vehicles as well.

You can no doubt identify a plethora of useful vehicles. Again, think hard about your relatively limited resources. Which vehicles are strongest or most influential on 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 vehicle or group of vehicles that might be useful?

Vehicle	Audience Influence (Strong, Moderate, Weak)	Asset on/at Hand (Yes, No)	Cost (No, Low, High)
Face-to-face meetings			
Telephone calls			
E-mails, e-newsletter			
Web site/blog			
Policy report/symposia			
Grassroots mobilization			
Media event/ outreach			
Op-eds, letters-to-the-editor, blog posts			
Facebook group			
Viral video			
Twitter campaign			



7. Design and implement Evaluation mechanisms

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 even examining a new product launch, ask yourself, how will I know my communications work is successful? 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 e-mail 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 Plan