

## **Strategic Communications Plan Template**

### **Mission Statement**

### **20- to 25-Word Organization Description**

### **Program Goals**

## **Strategic Communications Plan**

### **Outline**

#### **Step One: Conduct a Situation Analysis**

- A. Examine the External Environment
- B. Examine the Internal Environment
- C. Strengths, Weaknesses, Opportunities, Threats
- D. Analyze the SWOT

#### **Step Two: Connect with Your Audience**

- A. Audience Identification
- B. Audience Profile
- C. Select Priority Audiences

#### **Step Three: Communications Objectives**

#### **Step Four: Tailor Messages**

- A. Persuasive Messages
- B. Put a Human Face on the Work

#### **Step Five: Develop Appropriate Strategies and Vehicles**

- A. Evaluate Strategic Options
- B. Evaluate Existing Vehicles and Strategies
- C. Develop New Strategies and Vehicles

#### **Step Six: Evaluate Your Efforts**

- A. Strategy for Evaluation
- B. Develop Outcome Measures

#### **Step Seven: Create a Timeline and Budget**

- A. Develop a Calendar
  - B. Communications Budget Sheet
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## Step One Conduct a Situation Analysis

### A. Examine the External Environment

**Demographic Force:** Who are the primary groups that benefit from the organization? Has there been a shift or change in the populations or the makeup of the communities you serve? If yes, what does that mean? If no, is that cause for alarm?

**Economic Forces:** What are the sources of revenue for the organization? Is the financial base sufficiently diversified? How do donors perceive the organization, and what does that mean for its financial future (consider government funding, foundations, and corporate contributors)? Is the economy shifting in ways that will cause a growth or a decline in demand for services from the populations we serve?

**Technological Forces:** What are the latest trends in business technology that might allow the organization to be more effective? What are the latest products or trends in online technology that could impact the work: program development, technical assistance, volunteer recruitment, training, education, and so on? How will recent trends impact the organization? Does the organization need to improve its technology to create better products, improve services, and/or conduct more cost-effective advocacy efforts?

***Political Forces:*** How do current political priorities influence the organization and its work? What will be on the national, local, and state political agenda this year? Could it affect the organization or the populations it serves? If the winds blow our way, what can we expect? If they go against us, what is the worst that can happen? Is there something we are **not** seeing?

***Social Forces:*** What social or cultural trends are occurring in the community, in the state, in the nation? What does this mean for the organization and its work? What social or cultural values are embraced by the constituents that we serve? Have these values changed recently? If so, why? Does that impact the organization's relationship to its constituents? What is the mood of the nation? the community? What is the latest fear in society? What is the latest demand? What is the latest hope or solution being talked about? How could these fears, demands, and hopes impact the organization and its work?

**B. Examine the Internal Environment**

***Management Objectives:*** Is there a strategic plan that guides the work of the organization? Are there clear management objectives? Are staff members aware of the management objectives of the organization and what that means for their job performance? How do they relate to program objectives? Has the organization defined what each management objective means and why it is important for the organization's success? Are there mechanisms for staff input or feedback?

***Human Resources:*** What expertise does the staff have? What knowledge base resides in the staff? Do we provide training for staff? Do we have staff expertise in all the areas on which the organization is focused? Do we have too many or not enough volunteers for the programs that require volunteer involvement? What additional staffing do we require?

***Financial Resources:*** Is the organization on sound financial footing? Do its financial resources cover existing activities? Does the organization pay its expenses in a timely manner? Does the organization have a reserve fund? Does the organization have a core group of supporters and donors? Does this base need to be expanded? diversified?

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***Physical Infrastructure:*** Does the organization have enough workspace for staff, consultants, and temporary workers? Is the space conducive to teamwork? Are there adequate light, air, and heat? Can people have a private conversation if they need to? Is the neighborhood safe for staff working odd hours? Is there room to expand if the organization takes on new programs?

***Technology Infrastructure:*** Do people have adequate computers and software to perform their jobs? Does the telephone system meet the needs of the organization? Are there other special equipment needs that should be addressed?

How will these factors influence the implementation of our strategic communications plan?

**C. Strengths, Weaknesses, Opportunities, Threats**

What are our strengths?

What are our weaknesses?

What opportunities exist in the next 18 months?

What threats exist in the next 18 months?

D. Analyze Strengths, Weaknesses, Opportunities, Threats

	Opportunities	Threats
Strengths		
Weaknesses		

Unique opportunity for the next six months:

- 
- 
- 
- 

Challenge to address in the next six months:

-



# **Step Two** **Connect with Your Audience**

## **A. Audience Identification**

- Step 1. Review the following list and rate each audience in terms of its importance to your work (somewhat important, critically important, or not applicable).
- Step 2. Decide whether you have been effective or not effective at reaching out to them.
- Step 3. Rank the five most critical audiences for this planning process. Check the appropriate boxes.

Category	Step 1			Step 2		Step 3
	N/A	Somewhat Important	Critical	Not Effective	Effective	
Colleagues at other organizations						
Organizations with similar program interests and values or with whom we partner						
Organizations that oppose our work						
Activists/advocates (against us)						
Clients						
Activists/advocates (for us)						
Board members						
Volunteers						
Staff						
Private foundations						
Corporate foundations						

Donors									
Community leaders									
Community groups									
Church groups									
Government officials/policy makers									
Nongovernment policy makers									
Parents									
Educators/teachers									
Corporations—senior managers									
Small business owners									
Young people									
Health care providers									
Social service agencies									
Academic or trade press									
National press									
State and local reporters, editors, media outlets, specific programs									
Other audience(s) not on this list:									

**B. Audience Profile**

Audience \_\_\_\_\_

1. Describe your audience: What are their concerns? What characteristics of your audience are important to your organization (e.g., their education levels, income levels; family size, health issues)?
  
2. Why are they important to you?
  
3. Why should your audience care about your organization and its issues?
  
4. What do you want from this audience?
  
5. How does this audience receive information?
  
6. Are there particular individuals who have credibility or power over the target audience? What are their names?
  
7. Are there other individuals that can help you better reach this target audience? Who?

C. Select Priority Audiences

Review the previous list and select five groups that you will focus on for your strategic communications plan. Indicate how they are important to your work and the desired action you would like them to take.

Audience	Why Are They Important to Us?	Desired Action
EXAMPLE: NPO	Provides coordination with similar projects around our mission. Identifies resource needs and develops standard language on our issue.	How to work together and when we can work alone.
1.		
2.		
3.		
4.		
5.		

## Step Three

### Communications Objectives

Remember that communications objectives focus on changing specific knowledge, attitudes, or behaviors in the audience. Communications objectives have action verbs (e.g., educate, teach, inform, provide, conduct, enlist, mobilize, discuss, promote, build consensus).

#### Communications Objective 1

Target Audience:

Select One: ☐ Inform ☐ Engage ☐ Motivate ☐ Maintain

Desired Action:

Target Date:

State Objective:

#### Communications Objective 2

Target Audience:

Select One: ☐ Inform ☐ Engage ☐ Motivate ☐ Maintain

Desired Action:

Target Date:

State Objective:

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Apply the **SMART** test. Are your communications objectives:

☐ Smart? ☐ Measurable? ☐ Appropriate? ☐ Realistic? ☐ Time-bound?

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### Communications Objective 3

Target Audience:

Select One: ☐ Inform ☐ Engage ☐ Motivate ☐ Maintain

Desired Action:

Target Date:

State Objective:

### Communications Objective 4

Target Audience:

Select One: ☐ Inform ☐ Engage ☐ Motivate ☐ Maintain

Desired Action:

Target Date:

State Objective:

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Apply the **SMART** test. Are your communications objectives:

☐ Smart? ☐ Measurable? ☐ Appropriate? ☐ Realistic? ☐ Time-bound?

### Communications Objective 5

Target Audience:

Select One: ☐ Inform ☐ Engage ☐ Motivate ☐ Maintain

Desired Action:

Target Date:

State Objective:

### Communications Objective 6

Target Audience:

Select One: ☐ Inform ☐ Engage ☐ Motivate ☐ Maintain

Desired Action:

Target Date:

State Objective:

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Apply the **SMART** test. Are your communications objectives:

☐ Smart? ☐ Measurable? ☐ Appropriate? ☐ Realistic? ☐ Time-bound?

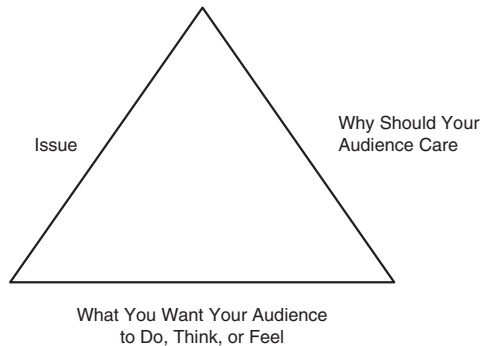
## Step Four Tailor Messages

### A. Persuasive Messages

Create a message for each of your priority audiences. It should have three parts. It should identify the issue and desired change, make it relevant to the audience, and provide an action step that the audience can take. Write your message as a complete sentence or two. Try to use the most persuasive language and use the word “you” at least once.

Target Audience: \_\_\_\_\_

Desired Change: \_\_\_\_\_



Part 1 (Issue)

Part 2 (Why Should Your Audience Care)

Part 3 (What You Want Your Audience to Do, Think, or Feel)

Now write a message combining all 3 parts as if you are talking to the audience.

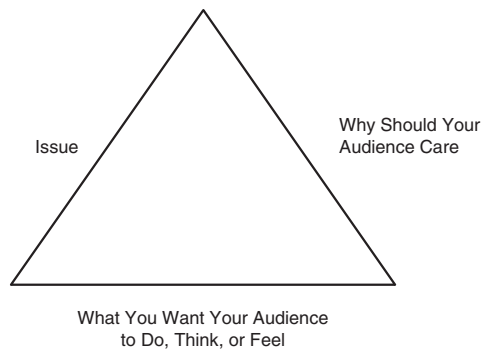


**Persuasive Messages**

Create a message for each of your priority audiences. It should have three parts. It should identify the issue and desired change, make it relevant to the audience, and provide an action step that the audience can take. Write your message as a complete sentence or two. Try to use the most persuasive language and use the word “you” at least once.

Target Audience: \_\_\_\_\_

Desired Change: \_\_\_\_\_



Part 1 (Issue)

Part 2 (Why Should Your Audience Care)

Part 3 (What You Want Your Audience to Do, Think, or Feel)

Now write a message combining all 3 parts as if you are talking to the audience.

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**B. Put a Human Face on the Work**

Select an anecdote that puts a “human face” on the work that you do.

Select a second anecdote that puts a “human face” on the work that you do.

What do these anecdotes say about the work that you do? What emotions are they likely to trigger with your target audience? Are there any privacy concerns or other issues that should be addressed before you use these anecdotes?

## Step Five Develop Strategies and Vehicles

### A. Evaluate Strategic Options

Targeted Audience: \_\_\_\_\_

**Step 1.** Review the strategic options under consideration and assign a numeric value (from 1 to 5, with 5 being the highest) for the effectiveness of each strategy against the seven criteria.

1. Responsive to Audience: 1 unresponsive, 5 highly responsive
2. Appropriate Relationship: 1 inappropriate, 5 builds on our strengths
3. Strategy Affects Perception: 1 emotional, 5 rational
4. Strategy Affects Message: 1 no control over message, 5 we control message
5. Effort to Implement: 1 draws on our strengths, 5 will tax our capacity
6. Cost to Implement: 1 least expensive, 5 most expensive
7. Impact on Others: 1 no impact on others, 5 allows us to reach other targeted audiences

**Step 2.** Decide which strategies are the most likely to give you the desired result with the target audience.

**Step 3.** Rank order the effective strategies for this target audience and this strategic communications objective.

Strategy	Responsive to audience	Appropriate relationship	Strategy affects perception	Strategy affects message	Effort to implement	Cost to implement	Impact on other audiences	Total	Rank order

Are all of these strategies designed to work in concert with each other and to be mutually reinforcing?

**B. Evaluate Existing Vehicles and Strategies**

**Step 1.** List existing vehicles used by your organization.

**Step 2.** Identify priority audiences that could benefit from these vehicles.

**Step 3.** Verify that each vehicle carries the right message.

**Step 4.** Verify that the vehicle is effectively reaching the audience.

Step 1	Step 2	Step 3	Step 4
Vehicles we use	Primary audience	Conveys our message?	Effective at reaching the audience?
<b>Face-to-Face</b>			
<b>Print</b>			
<b>Audio</b>			
<b>Video</b>			
<b>Web Site/E-mail</b>			

**C. Develop New Strategies and Vehicles**

**Communications Objective 1**

**Target Audience:**

**State Objective:**

Which vehicles will you use, how will you use them, and why are they good strategic choices?

☐ **Face-to-Face:**

☐ **Print:**

☐ **Audio:**

☐ **Video:**

☐ **Web Site/E-mail:**

☐ **Other:**

## Communications Objective 2

**Target Audience:**

**State Objective:**

Which vehicles will you use, how will you use them, and why are they good strategic choices?

☐ **Face-to-Face:**

☐ **Print:**

☐ **Audio:**

☐ **Video:**

☐ **Web Site/E-mail:**

☐ **Other:**

### **Communications Objective 3**

**Target Audience:**

**State Objective:**

Which vehicles will you use, how will you use them, and why are they good strategic choices?

☐ **Face-to-Face:**

☐ **Print:**

☐ **Audio:**

☐ **Video:**

☐ **Web Site/E-mail:**

☐ **Other:**



## Communications Objective 4

**Target Audience:**

**State Objective:**

Which vehicles will you use, how will you use them, and why are they good strategic choices?

☐ **Face-to-Face:**

☐ **Print:**

☐ **Audio:**

☐ **Video:**

☐ **Web Site/E-mail:**

☐ **Other:**

## **Communications Objective 5**

**Target Audience:**

**State Objective:**

Which vehicles will you use, how will you use them, and why are they good strategic choices?

☐ **Face-to-Face:**

☐ **Print:**

☐ **Audio:**

☐ **Video:**

☐ **Web Site/E-mail:**

☐ **Other:**

## Communications Objective 6

**Target Audience:**

**State Objective:**

Which vehicles will you use, how will you use them, and why are they good strategic choices?

☐ **Face-to-Face:**

☐ **Print:**

☐ **Audio:**

☐ **Video:**

☐ **Web Site/E-mail:**

☐ **Other:**

**Step Six**  
**Evaluate Your Efforts**

**A. Strategy for Evaluation**

<p>Define the purpose of the evaluation. What activities are you planning to evaluate? Will you be measuring communication activities or communication impact? Who is the target audience?</p>	
<p>Who will be on the evaluation team?</p>	
<p>List the measurable aspects of your communications objectives in the first column and indicate how you intend to measure those aspects in the second column.</p>	

## B. Develop Outcome Measures

Reexamine the communications objectives you created. List 3 measurable activities and 3 measurable impacts below. If need be, revise the communications objective to be sure you are measuring both impact and activities.

### Communications Objective 1

Activities to Measure:

- 1.
- 2.
- 3.

Impacts to Measure:

- 1.
- 2.
- 3.

State or revise the communications objective to demonstrate impact:

### Communications Objective 2

Activities to Measure:

- 1.
- 2.
- 3.

Impacts to Measure:

- 1.
- 2.
- 3.

State or revise the communications objective to demonstrate impact:

### **Communications Objective 3**

Activities to Measure:

- 1.
- 2.
- 3.

Impacts to Measure:

- 1.
- 2.
- 3.

State or revise the communications objective to demonstrate impact:

### **Communications Objective 4**

Activities to Measure:

- 1.
- 2.
- 3.

Impacts to Measure:

- 1.
- 2.
- 3.

State or revise the communications objective to demonstrate impact:

### Communications Objective 5

Activities to Measure:

- 1.
- 2.
- 3.

Impacts to Measure:

- 1.
- 2.
- 3.

State or revise the communications objective to demonstrate impact:

### Communications Objective 6

Activities to Measure:

- 1.
- 2.
- 3.

Impacts to Measure:

- 1.
- 2.
- 3.

State or revise the communications objective to demonstrate impact:

## Step Seven

### Create a Timeline and Budget

### A. Develop a Calendar

Write the month, date, activity, and person responsible for each task involved in implementing each strategy. Note events, holidays, lunch dates, etc.

[illegible]



## B. Communications Budget Sheet

[illegible]