COMMUNICATIONS *and* ENGAGEMENT
WORKBOOK

PLAN YOUR COMMUNICATIONS CAMPAIGN

This five-step process is designed to help you build a thoughtful and thorough campaign.

STEP 1
SEGMENT

Identify the key players on this issue, then zero in on who you most need to reach and engage ("targets").

STEP 2
STRATEGIZE

For each target, develop a specific communications or engagement goal.

STEP 3
SIMPLIFY

For each target, develop messages that are clear and compelling — on both a rational and emotional level.

STEP 4
SEQUENCE

Identify key milestones … and a series of tactics and channels to reach each target.

STEP 5
SUCCESS

Decide up front how you'll measure success.

WHAT'S IN THIS WORKBOOK

STEP 1
Segment

STEP 2
Strategize

STEP 3
Simplify

STEP 4
Sequence

STEP 5
Success

PROGRESS CHECKLIST

Before you get started, take a few minutes to assess your efforts so far and identify the areas that still need work or where you might need some assistance.

SEGMENT: Identify targets

We're solid

This needs work

We need help

STRATEGIZE: Set goals

We're solid

This needs work

We need help

SIMPLIFY: Craft messages

We're solid

This needs work

We need help

SEQUENCE: Identify key milestones/Choose channels

We're solid

This needs work

We need help

SUCCESS: Measure results

We're solid

This needs work

We need help

Build an action plan

We're solid

This needs work

We need help

SEGMENT: KEY PLAYERS LIST

By analyzing all of the specific players in your community (including key internal stakeholders), you can determine communications and engagement targets, identify messengers and focus efforts.

Make a list of key players.

1. List the various internal audiences — parents, early childhod educators, policymakers, community influencers, business leaders, etc. — who need to know about this work.
2. Get specific. Name names. List real people, individuals who represent groups, or the names of organizations, etc.

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KEY PLAYERS INFLUENCE MAP

You can't and don't need to communicate with and/or engage everybody. This map helps you focus your time and energy in the areas likely to have the most impact.

Plot each key player on the influence map.

Most influential

| WATCH THEM | YOUR TARGETS | YOUR MESSENGERS/ CHAMPIONS |

Strongly opposes ← → **Strongly supports**

NOT A PRIORITY

Least influential

THESE ARE HEARTS AND MINDS THAT CAN'T BE CHANGED NO MATTER WHAT YOU DO

Your targets are the "moveable middle" — the people you have to inform and engage and the people who can still be persuaded one way or the other. This is where you should focus.

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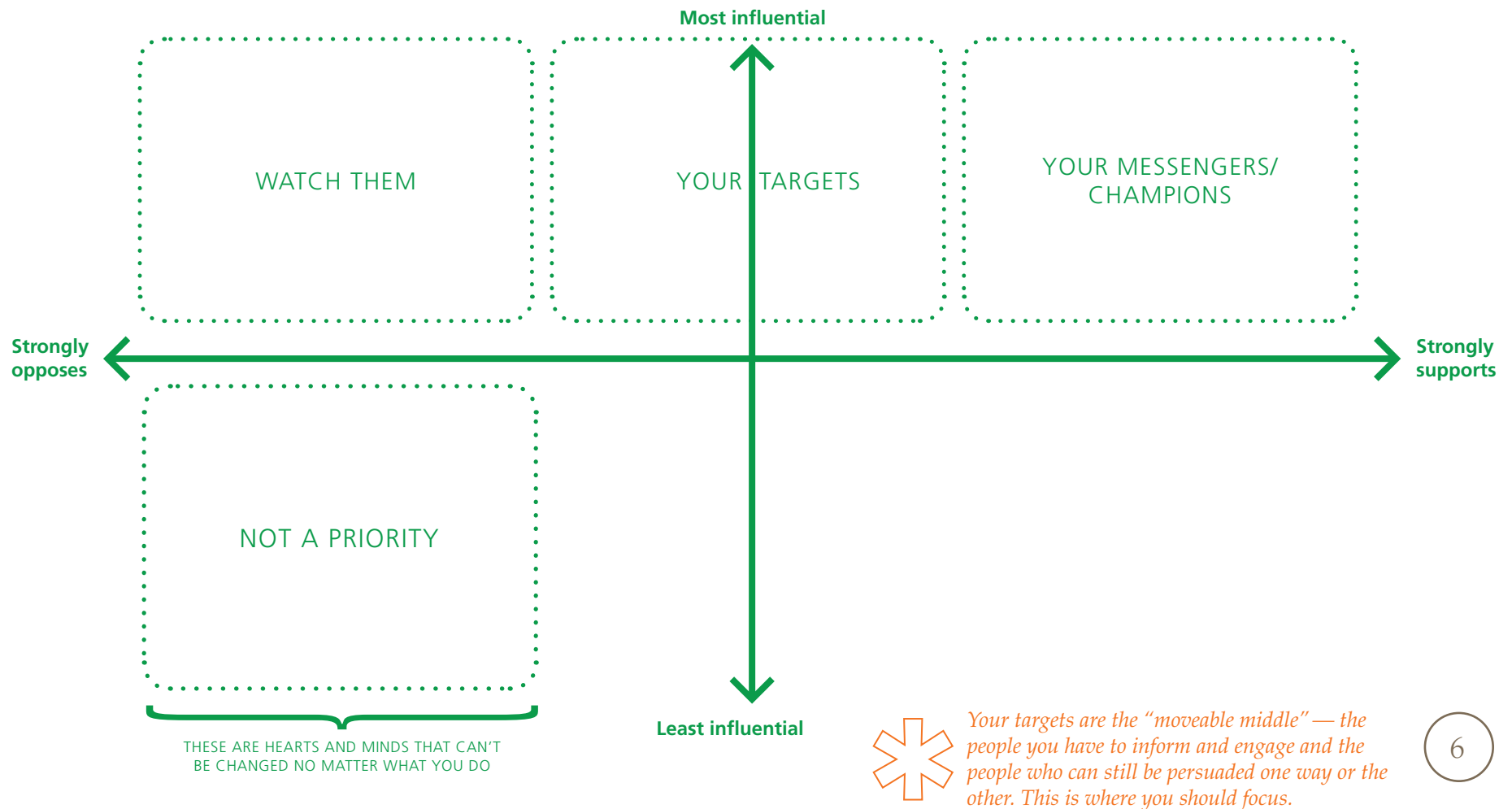
TARGETS AND MESSENGERS LIST

Determine who is best situated to reach your key targets.

Based on the Influence Map from the previous page, list your targets and messengers (the champions who are best equipped to reach your targets).

TARGETS ◎

MESSENGERS 🏃

Think about which targets become most important at each key milestone (step 4A).

Messengers come into play later in the process. Since they share your values and passion and have influence in your community, they can champion your message and strengthen your channels.

STRATEGIZE: GOAL-SETTING TOOL

Set a goal before crafting messages, developing tactics, or choosing channels. Make it clear, concise, and measurable. Your goal might focus on one-way communication (informing) or two-way communications (more engagement and involvement).

State your goal for each target: For each, what do you want them to think, feel, or do?

	TARGET 1	TARGET 2	TARGET 3	TARGET 4
GOAL				
THINK, FEEL, OR DO				

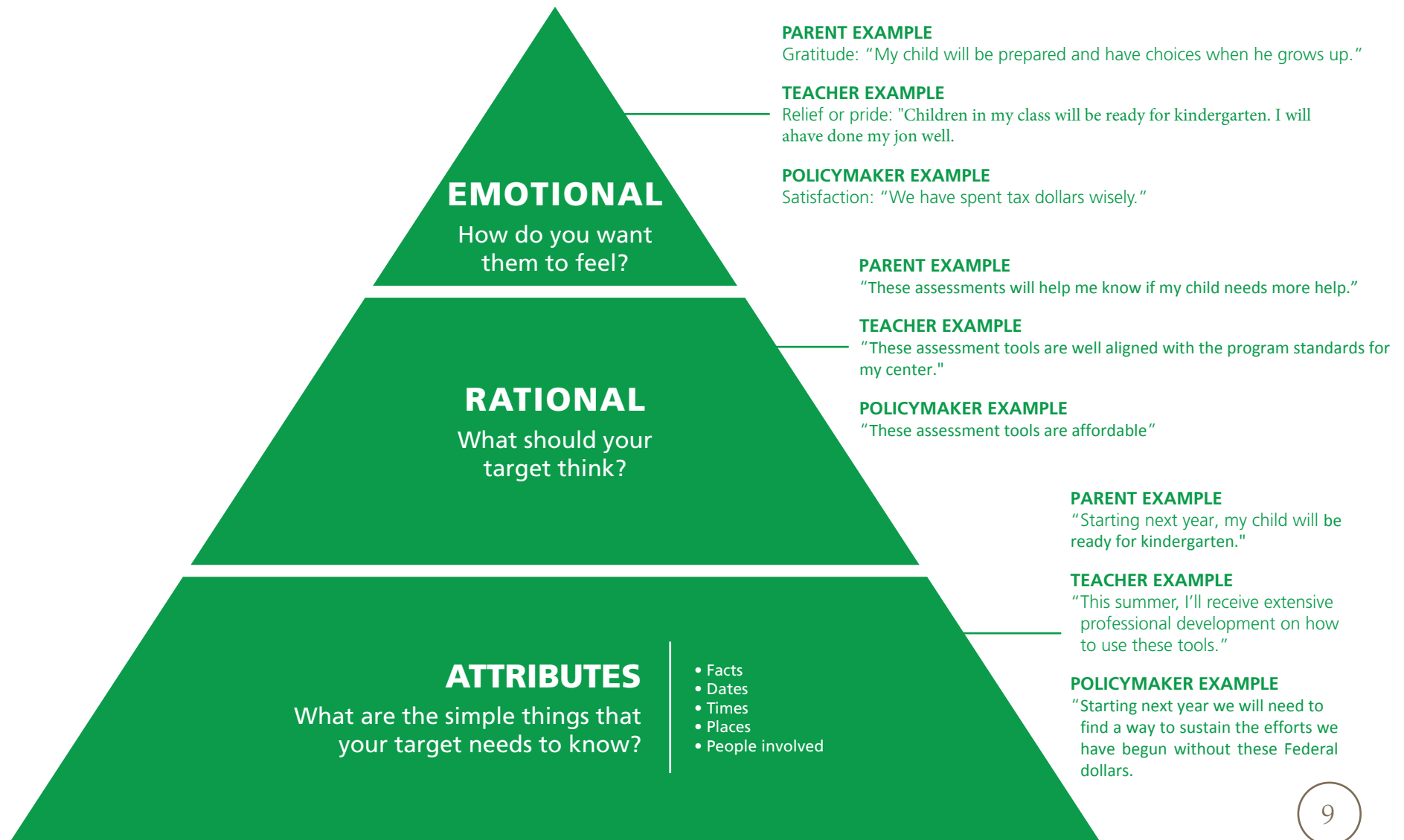*You can't know if you were successful if you don't state a goal.*

SIMPLIFY: MESSAGING PYRAMID

Your message for every target audience has an attribute or "need-to-know" component, a rational component (benefits), and an emotional component.

EMOTIONAL
How do you want them to feel?

PARENT EXAMPLE
Gratitude: "My child will be prepared and have choices when he grows up."

TEACHER EXAMPLE
Relief or pride: "Children in my class will be ready for kindergarten. I will ahave done my jon well.

POLICYMAKER EXAMPLE
Satisfaction: "We have spent tax dollars wisely."

RATIONAL
What should your target think?

PARENT EXAMPLE
"These assessments will help me know if my child needs more help."

TEACHER EXAMPLE
"These assessment tools are well aligned with the program standards for my center."

POLICYMAKER EXAMPLE
"These assessment tools are affordable"

ATTRIBUTES
What are the simple things that your target needs to know?

- Facts
- Dates
- Times
- Places
- People involved

PARENT EXAMPLE
"Starting next year, my child will be ready for kindergarten."

TEACHER EXAMPLE
"This summer, I'll receive extensive professional development on how to use these tools."

POLICYMAKER EXAMPLE
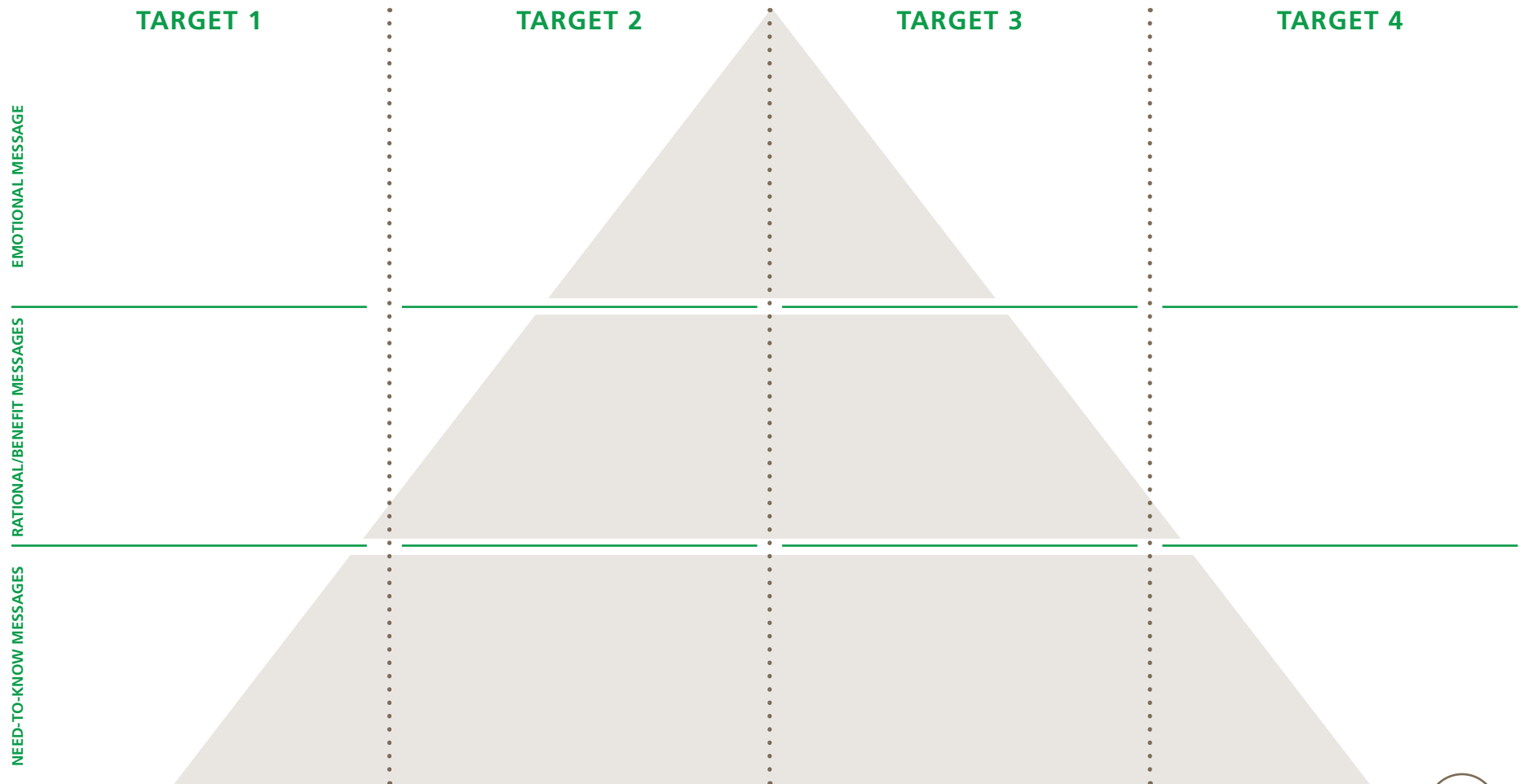"Starting next year we will need to find a way to sustain the efforts we have begun without these Federal dollars.

MESSAGING PYRAMID

Your message at every make-or-break moment has an attribute or "need-to-know" component, a rational component, and an emotional component.

What are the three messaging components for each target?

	TARGET 1	TARGET 2	TARGET 3	TARGET 4
EMOTIONAL MESSAGE				
RATIONAL/BENEFIT MESSAGES				
NEED-TO-KNOW MESSAGES				

You're developing messaging direction, not writing copy. Keep it brief and keep moving.

SEQUENCE: IDENTIFY KEY MILESTONES

Identify the make-or-break moments when proactive communications and engagement are essential. Some might be obvious, like an upcoming board budget vote. Others may be less so, like program directors' meetings.

A complete communications/engagement plan includes all the key milestones, plus the points before, during and after. For the purposes of this workbook, select three to five make-or-break moments from your timeline.

2015   **2016**   **2017**

Key milestone A

Key milestone B

Key milestone C

Key milestone D

Key milestone E

TACTIC AND CHANNEL LIST

Every message needs to be expressed, executed and delivered to the target.
Think about how your targets consume information and start compiling a list.

> Fill out a separate sheet for each milestone.

Key milestone A

1 CONSIDER THESE QUESTIONS

- What are your targets' regular information and dialogue sources?
- Who are the people and institutions they trust most?
- Where do they gather, socially and virtually?

- What unique channels and tactics can key players bring to the table?
- What's free? What requires spending?
- How does the reach of each channel compare?

2 CHOOSE TARGET + TACTIC + CHANNEL

WHO (TARGET)	WHAT (TACTIC)	WHERE/HOW (CHANNEL)

Think about which messengers can strengthen the message and the channel.

Sample channels:

Meetings/presentations	PD sessions	Web	Earned media (newspapers, TV, radio)
One-on-ones	Op-eds	Social media	Print collateral (one-pagers, FAQs)
Advisory committees	Letters home	Video	Union, PTA/PTO and other third-party partners

SUCCESS: MEASUREMENT TOOL

Restate your goal for each target and determine how you'll measure success.

KEY TARGET 1	KEY TARGET 2	KEY TARGET 3	KEY TARGET 4
Restate your goal:			
How to measure success?			

Examples for measuring success:

Website visits	Facebook likes	Legislative activity
Number of downloads	Positive press	Phone center calls
Email opens	Before and after polling	Print distribution numbers

_____
_____
_____

BUILD AN ACTION PLAN

As you're working through each target and goal, use this planning template to chart your course, track your progress and assign responsibility.

TARGET	GOAL	KEY MILESTONE	TACTICS + CHANNELS + MESSENGERS	OPPONENTS/ POTENTIAL CHALLENGES	PARTNERS	NEXT STEPS	OWNER

Remember, a complete action plan includes all the key milestones, plus all the communication opportunities in between. Communicate and engage early, often and continuously!