4 Steps Every Nonprofit Should Take Before Creating Its Strategic Communications Plan

A simple guide to laying the foundation for an effective nonprofit strategic communications plan

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Introduction

When I started my career more than 20 years ago, I had the privilege of being on the front lines of an extraordinary company that would change the face of technology, and I was mentored by many of the best PR and marketing pros in the business. While I paid my dues early on — including stuffing 5,000 press kits in a 10-foot-by-10-foot room (by myself), sorting six months’ worth of press clips in five different languages (English NOT included), showing up for 4 a.m. broadcast calls during the Consumer Electronics Show, traveling many miles with buses full of journalists to make sure they arrived at that important briefing with our executives, and powdering the faces of many a CEO — I was also lucky enough to live and work on the ground in dozens of countries around the world. My experiences crossed the tech, entertainment, sports, financial, CSR, fashion, consumer and B2B worlds, and I received hands-on experience in almost every communications and marketing practice.

While I made the shift into the philanthropic world almost eight years ago, I find my experiences in years past remain relevant and instructive. Communications and marketing disciplines have done a 180-degree shift in the last five years, forcing all of us to think beyond what we thought we knew about strategic communications.

But there is still one constant. That constant is asking WHY.

I learned early on that jumping to HOW was a big mistake. It’s only natural for your mind to go there — “Ooh, what if we did a press conference?” or “Let’s shoot a video” or “We must issue a press release!” or “I know, we could blog about it!” Then there’s my personal favorite: “Hey, let’s name it and make a logo!” I can still remember my first boss, during a brainstorming meeting, saying, “Yes, that’s a great idea — but WHY? Will your idea contribute to what we’re trying to achieve?” To this day, I ask the same questions of myself, my team and my collaborators.

The reality is that you must ask WHY before you ever get to WHAT and HOW. You must understand exactly the outcomes you want, the business objectives you’re trying to support, and who your relevant stakeholders and target audiences are. In the absence of understanding these fundamentals and the environment in which the nonprofit is operating, your organization’s communications efforts will be a waste of time and money. It doesn’t matter if you have a million dollars or a thousand dollars a month to spend. I guarantee failure.

And that’s where we come to planning for the plan for nonprofit communicators.

I’m quite sure I just heard virtual groans. Relax! I don’t mean having meetings to plan what to do at the next meeting. I mean collecting and understanding key information before pen is put to paper or fingers to keyboard to develop a strategic communications plan.
Why is it important? Because attaining this understanding contributes to defining and building the brand, and it preps nonprofits for how to create brand ambassadors and neutralize the brand assassins. (Brand assassins are those individuals or groups that have nothing good to say about your organization or your efforts — most likely because they don’t understand them.)

Just to be clear, when I say “brand” I am referring to reputation. And whether it’s a nonprofit, educational group or a corporation, every organization has one.

I encourage nonprofit communicators to ask an important question: Is your current communications program empowering and enabling ambassadors? Or is it creating brand assassins because it fails to understand what your stakeholders need and to provide them with what they need in order to support you?

Lacking that understanding means lacking a strategic communications plan. If that’s your nonprofit, don’t worry. You’re in good company.

According to a survey by NonProfit Marketing Guide.com, 70 percent of nonprofits best describe their strategic communications plan in one way or another as non-existent.

Regardless of the communications channel du jour, this e-book will get nonprofit communicators going and provide a methodology for ensuring that, rather than mere functions within your organization, nonprofit communications efforts constitute a full-on business strategy designed to build brand ambassadors. Let’s get started.

“I believe that you have to understand the economics of a business before you have a strategy, and you have to understand your strategy before you have a structure. If you get these in the wrong order, you will probably fail.”

— Michael Dell, CEO & Chairman, Dell Corporation
Understand Your Starting Point and Your Environment
Understand Your Starting Point and Your Environment

When it comes to communications for nonprofits and foundations, understanding your starting point and environment is key to your success. This is because the mission and needs of the organization wholly drive the activities of the communications team. Unlike in a traditional for-profit business, where you must answer to stockholders and internal stakeholders, in the nonprofit world you have to respond to a variety of stakeholders, including donors, partners, beneficiaries and the community. What’s more, your organization likely has a different set of objectives for each stakeholder group. For example:

- **Donors** – increasing donations year to year
- **Community** – improving your volunteer requests by 20 percent in the second half of the calendar year
- **Grantees** – improving their understanding about your new funding focus areas before the end of the calendar year, in order to shorten the application cycle for funding
- **Community leaders** – improving their opinion of your organization within two years, to improve collaboration.

For each stakeholder group, then, you have different business strategies within your organization. And understanding those strategies (the WHAT) before you dive into tactics and channels like media relations or social media or any other communications program (the HOW) will drive when and how you use those channels to support those objectives.

Understanding your starting point and environment is a process we can break down into five steps.

**Step 1 – Determine your approach**

Consider your approach to communications. Are you reactive to the day-to-day, or do you proactively seek opportunities? Do you measure the output and outcomes of your activities, or do you just hope and wish there will be some sort of visible impact? Ideally, your communications activities should fall mostly on the right side of the diagram on the next page. If you favor the left side — well, you have to think about whether or not communications is truly a business strategy for your organization.
Check all that apply.

- Reactive
- Proactive
- Tactical
- Strategic
- Opportunistic
- Disciplined
- Not measured
- Measurable

Make no mistake, communications is — or needs to be — a business strategy. It’s not an afterthought or a subset of activities that have been randomly selected. It is not the social media flavor of the month. As a business strategy, communications:

- Defines your brand and your reputation
- Builds trust with communities
- Drives opportunity for your organization — whether it’s with news media, influencers, potential donors or other key target audiences
- Helps you more effectively fulfill your mission.

Step 2: Find the sweet spot between reactive and proactive

Communicators will always have to react to internal issues, such as budget cuts or safety concerns, as well as the news cycles and expressions of public opinion that result from them. That’s the nature of the beast. But how you react won’t always be the same in every case. And how effectively you react depends on how well you’ve planned.

Occasionally, you’ll have the unexpected — a school cheating scandal, or a shortage in program funding due to the economy. But if you’ve thought through and prepared for similar situations, handling these specific surprises won’t weigh you down.

Nor should it derail your proactive program. Your proactive program focuses on how you want to define your organization — how you want to be known or what you want to be...
recognized for, and how others can help validate that vision for you.

The intersection between proactive and reactive is what I call the *sweet spot*. It’s a delicate balance, but that’s where the magic can happen. If you’ve taken the time to be proactive — defining your brand, defining a plan for building it, and aligning it with all your stakeholder groups — the reactive topics will often align on their own. And if they don’t, you’ll at least be better prepared to redirect them and situate your organization ideally.

I consider communications to be a practice of “anticipating consequence” — always planning for the outcomes of our activities and decisions and working backwards from there. It’s Common Sense 101. I always plan for the worst-case scenario, because that’s how to ensure my teams are prepared and can spend more time on our proactive communications programs.

Here’s one example of proactive communications: State education agencies and many districts/charter management organizations often prepare their schools with messaging *before* state assessments or rankings are released to the public, rather than waiting until after results are released and commentary starts pouring in from the community and policy makers.

Another example: The work done by Michelle Rhee, former chancellor at DC Public Schools (DCPS). While her tenure and outcomes were criticized, it is clear that her communications team actively messaged her strategy and previewed the changes she was expected to make. Their proactive communications approach led them to the cover of *Time* magazine and other high-profile media wins over a three-month period.

**Step 3 – Learn the phases of a strategic communications planning process**

*There are four phases of a strategic communications planning process.* You’ll notice from the diagram that half of this process (the first two stages) is about preparation. As I said, it’s really easy to jump to execution (the HOW), but we must be disciplined about understanding our starting point.

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<td><strong>Goal:</strong> Distill knowledge, insights and hypotheses into a focused strategic platform.</td>
<td>Program Elements/ Tactics</td>
<td><strong>Goal:</strong> Deploy an actionable plan and timeline to implement programs with available/planned resources.</td>
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Phase 1: Research
This is where you gather the intelligence you need to help you begin planning. A well-structured communications plan leans as heavily as possible on information gathering. We need to dispel everything we think we know about our organization, our environment and the needs of our stakeholders or audiences. Research helps us avoid the guesswork. There are a number of different ways to do this: with primary research (focus groups and surveys), secondary research (reports and studies that are already available in the public realm) and SWOT (strengths, weaknesses, opportunities and threats) analysis. No matter what your budget, there are a variety of ways to capture the information you need to create a solid foundation for the next phase: Planning.

Phase 2: Planning
The Planning phase is where you actually get your hands dirty.
1. Identify or define your ultimate, lofty (and measurable) goal.
2. Identify key stakeholders or target audiences.
3. Work through the most effective messaging to reach these groups.
4. Outline measurable communications objectives.
5. Define your strategy.
6. Develop the program elements (or tactics) to meet your communications objectives.

Phase 3: Execution
This is the fun stuff, and only after you’ve done proper research and planning do you get to do it. As you work through implementation, you’re considering the programs or tactics that carry forward your ideas and intentions, and you’re placing them against a structured timeline using the resources available to you.

You can’t manage what you can’t measure.
— Michael Dell

Phase 4: Measurement
Finally, we end the process with Measurement. This is where you figure out whether you achieved what you set out to achieve. How will you know you’ve met your communications objectives? Achieved the business goal? Structured your messaging properly? At this stage you’ll measure outputs (tallying quantitative results like numbers of news clips) and outcomes (examining the content of those clips for your key messages or monitoring social media conversations).
This phase is crucial for achieving a solid return on investment — or, in the case of a nonprofit, return on mission. Furthermore, Measurement is part of an iterative process that will help you in subsequent planning years, improving your strategies and programs as you go.

**Step 4 – Choose the right channels**

There are a variety of communications channels that professionals rely on. This is the toolbox that you’ll pull out to achieve your objectives. But be realistic. They are time and money dependent. And frankly, you don’t need to use them all at once; it’s likely that many won’t be appropriate for reaching your organization’s goals. Here are some examples:

- **Digital Communications** includes your organization’s website, blog and social media platforms, such as Facebook, Twitter, Instagram, Google+ and LinkedIn.
- **Community Relations** includes communications and outreach initiatives, such as events, forums and roundtable discussions.
- **Public Affairs** is geared toward elected and government officials.
- **Executive Visibility** (also known as thought leadership — how you use your internal staff to enhance, strengthen or further define your brand) includes speaking opportunities and publishing, such as opinion editorials and bylined articles.

Planning helps you decide how to make the most of these channels — when and where to use them most effectively to help you achieve your communications objectives and, ultimately, your organization’s goals.
Step 5 – Take inventory of your toolbox

Use this checklist to identify the channels you currently use or have available to use in your communications implementation.

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Case Study – Coca-Cola


As I mentioned, the communications and marketing world has made a 180-degree turn over the last five years, and many of the practices we have known have changed — to the point that they’re almost unrecognizable. There has been a corresponding shift in how we communicate — from a hierarchical, controlled, one-way dialogue to real-time, two-way conversations. In the past, organizations pushed information out through media and company materials; today, they have the opportunity, if not the responsibility, to listen to and participate in a conversation.

I like to look outside the nonprofit world for insight and inspiration — frankly, because the philanthropic and development world is relatively nascent in its use of communications as a business strategy. Coca-Cola is a great example of an organization that gives a great deal of control to their ambassadors and is enjoying great rewards as a result. For example, when two fans created their own Coke page on Facebook, the company chose not to send a cease-and-desist order and, instead, partnered with them by providing information and content. The page has 88 million “likes” by other Facebook users and is adding 100,000 per week. Best of all, the community surrounding this page is the first to speak out against Coke’s brand assassins.

While we’re beginning to see organizations delve into storytelling as a mechanism to drive awareness and understanding, many of the approaches and channels used by the for-profit world are used very little by nonprofits, foundations and others organizations focused on social progress. The most successful organizations recognize the importance of building and maintaining their brands in order to instill confidence among their stakeholder groups. They’ve learned to empower and enable their ambassadors to help with, and even expand, their communications efforts — including by addressing brand assassins — and they leverage the right communications channels to achieve this.
Hone In on Your Target Audience
Hone In on Your Target Audience

All the goals, objectives and messaging in the world won’t save you unless you know who you need to communicate with. You cannot build an effective communications program until you’ve taken the time to listen to your stakeholders and understand their point of view, needs and concerns.

So once you understand your starting point and environment, you can begin the task of honing in on your target audience. This process can be broken into three steps.

Step 1 – Map stakeholder groups

Figure 1 is an example of a stakeholder map from an energy company, developed specifically for its business/B2B customers. What this company realized in its research is that its customers didn’t fully trust the information coming from energy companies; these customers sought out advice and insight from industry associations, consultants and the media. Based on this research, the energy company decided that it might better reach their customers by leveraging third-party influencers. In other words, by understanding how decision makers within its customers’ companies sought information and developed opinions, the energy company was able to enhance its “direct” communications to these customers.

“All truths are easy to understand once they are discovered; the point is to discover them.”

– Galileo Galilei

This example encourages you to think beyond merely listening to your stakeholder groups. Who influences your stakeholders, and is there any way you can leverage them to your advantage? Categorize them so that you can efficiently customize communications to each group — but try to be specific, down to the names of individuals within organizations. I always like to start with a map and then populate it with as many details as possible. You may end up with more of a database than the constellation shown in the graphic.

Bottom line: sometimes one audience is a channel to another. Don’t forget that.

(By the way, it’s okay if your map doesn’t end up looking like the constellation shown in Figure 1, on the next page. For example, you may end up with more of a database. That’s fine, as long as it is complete and categorized in a way that serves the next step.)
Step 2 – Prioritize stakeholders

Trust me when I say that not everyone can be your primary target audience. A database will allow you to start ranking stakeholders — one, two, three, etc. — which allows you to focus on the right things at the right time. And although we spend a lot of time looking externally to satisfy the needs and concerns of our stakeholder groups, when it comes to communications, we should always start internally.

- Always start from the inside and work out
- Who are your brand ambassadors that can help you with other audiences?
- Who are your brand assassins?

We start with our internal audiences because everyone within the organization needs to understand what you’re trying to achieve and how to consistently communicate that vision.

Imagine if everyone in the organization speaks the same language and shares the same message at the same time. It makes the messages to your external audiences clear and
believable, because they’re hearing the same message from many different people within the organization.

I admit, beyond first focusing inward, there is no perfect methodology for prioritizing stakeholders; every organization’s goals are different. But every organization can come up with its own methodology, by looking at a few key conditions:

1. If you have many ambassadors but not many resources for communications, you might consider getting those ambassadors to speak on your behalf. Examples are partners, grantees, community leaders, etc.—individuals that believe in what you’re doing and have influence in the community.

2. If you have a lot of brand assassins, you may need to make them a priority before you move on to other stakeholder groups. This is because providing detractors a better understanding of what you’re trying to achieve often succeeds in neutralizing or even converting them.

Step 3 – Re-prioritization

For many reasons, you may need to re-prioritize as you go: maybe each initiative requires its own approach, your organization has a yearly planning or review process, or it undergoes or adopts some kind of change, like a new program or initiative.

The Denver Independent School District (DPS), a longtime grantee of the Michael & Susan Dell Foundation, engaged in a re-prioritization effort that serves as a good example. A few years ago, it rolled out a new teacher portal for performance management work, making existing student data available to teachers in a much easier way than the files and binders that had been used historically. To ensure an effective rollout, they put a formal and informal communications strategy into action that targeted only teachers, explaining what the goals were, how the tools worked, and how using them would leave teachers and students better off. This strategy was implemented so that teachers were on board with the new system before the school district communicated externally to the community.

Step 4 – Gather insights on your audiences

Once you’ve mapped and prioritized your audiences, your next step is to reach a deep understanding of each one. This ensures your communications are relevant and, ultimately, effective.

Mass communication today is basically dead. It’s no longer effective. The public expects that you will do your homework and get it right — that we will live in their world, not ours. Audience insights will make you better equipped to deliver meaningful messages.
Here are a few ways to learn more about your audiences:

- **Market Research**

  You may have access to market research. If so, great. You should take advantage of it. If you don’t, you should consider conducting or locating some. The effort can be expensive and the results potentially narrow, but you can customize them by demographic and psychographic information, which are statistics you need to understand your community.

  You might be able to find existing research or get help with this research from economic groups (such as chambers of commerce), state education agencies or even census data, rather than commissioning it yourself. You’d be surprised how much information is available from reputable data sources.

- **Media Audits**

  Another recommendation is a media audit. Examining past media coverage gives you valuable insights into how your area of focus is discussed and perceived. An ideal audit would include twelve months of coverage, six months at a minimum.

  In addition to your own areas of focus, you should audit media coverage of the societal issues that challenge your audiences. This helps you better understand your audience’s position and dynamics, as well as how your mission can support or solve bigger societal issues. A few tips:

  1. Review coverage from reporters that cover your organization’s focus area (e.g., education, health, poverty, etc.), but also look at city and/or business news.
  2. Include editorials, op-eds and letters to the editor in your research. Many issues bubble up in these channels.
  3. Don’t forget parenting publications or community newspapers that are published for your area. You can see trends within national-level parenting publications too.

- **Social Media**

  Social media gives us the ability to listen in on discussions, decipher attitudes and opinions, and figure out what the hot topics are in the present moment. You should be monitoring and participating in the conversations via Twitter, Facebook or LinkedIn groups. It’s free, but it does take time and patience.

  Monitoring social channels will give you a firsthand view of the issues, opinions and conversations among your key stakeholder groups — and the shifts taking place within those issues, opinions and conversations. Many social media platforms have well-developed and easy-to-use audience insight tools that can contribute to your audience profiling as well.
• Community Events

One of the best ways to learn more about your audiences is to get out into the community. For you that might include talking with parents at parent/teacher night, PTA meetings and school board meetings. Additionally, you can conduct your own roundtable discussions with parents or create similar forums for community sharing. I also recommend one-on-one meetings with people in your stakeholder groups.

Here are some links to free resources to help nonprofits gather audience insights:

http://www.brandwatch.com/2013/08/top-10-free-social-media-monitoring-tools/
http://simplymeasured.com/free-social-media-tools/

Case Study – ‘Be Well’ Book Project

In 2008, the Michael & Susan Dell Foundation identified a need in the marketplace for easy-to-understand information and steps that can guide families to live healthier lives. Efforts up to that point were missing the target in one way or another: Reputable health organizations were reaching out to low-income families with information that wasn’t relatable or culturally specific. The foundation’s own investments in childhood obesity prevention focused on children — initiatives in schools and out-of-school programming — and while the national narrative on childhood obesity did increase in volume, the percentages of overweight and obese children and adults in the United States increased as well.

We knew we had to take a different approach. We mapped different stakeholder groups impacted by the issue, and looked at them in terms of the role the foundation could play. This led to the identification of low-income urban mothers as a primary target audience.

We already knew from existing research that parents are a child’s best role model. So we determined that the best place for kids to learn healthy habits was at home.

After mapping our stakeholder groups, we identified a progressive organization (and long-time grantee) in the field — The Alliance for a Healthier Generation, a partnership between the American Heart Association and the Clinton Foundation. We approached them to collaborate with us on this project for two reasons: they had established programming and a communications channel reaching children and families through their Healthy Schools Program; and they had a voice in the marketplace and credibility with many additional stakeholder groups beyond families.

Then we turned our attention to our target audience. There was a lot of market research about low-income urban mothers, and we distilled that information down to the
ingredients most important to us: whom they asked for advice, what kind of media they watched, how they used technology, and the types of community organizations they trusted for support and service.

From these insights we created a physical book showcasing 15 low-income mothers from across the country and using their stories to inspire other parents to help their children establish healthy habits. Their stories featured messages about five targeted obesity-related behaviors: increasing fruits and vegetable intake; increasing physical activity; decreasing screen time; decreasing consumption of foods with high energy density; and decreasing consumption of sugar-sweetened beverages. We then invited intermediary organizations, like community groups, pediatricians, grantees and the media, to learn about the book and discuss (and possibly distribute) it among mothers in their constituencies.

This project has since led to a second book, “A Year of Being Well: Messages from Families on Living Healthier Lives,” which includes a complementary discussion guide. A total of more than 2 million free copies have been distributed to families since 2009 across the United States.
Conduct a Proper SWOT and Develop a Situation Analysis
Conduct a Proper SWOT and Develop a Situation Analysis

You’ve looked at your starting point and environment, and you’ve also studied your target audience. But we’re still at the stage of “planning for the plan” — we have more work to do in understanding WHY.

A SWOT analysis assesses the Strengths, Weaknesses, Opportunities and Threats of your organization. I’m a big fan of SWOT because it fosters open, honest and objective discussion about your work. I think of it as “internal soul-searching.”

But it’s more than that, of course. A SWOT analysis is a decision-making tool to help you reach conclusions about what you’ll need to develop your communications plan.

At the Michael & Susan Dell Foundation, we use SWOT to assess our communications activities. It forces us to take a closer look at our efforts and helps us uncover truths we may have missed about the work we’re doing. It’s a chance for us to ask some frank and fundamental questions: How are we doing? What could we be doing better? Do messages resonate? How do we know?

Each pillar of the SWOT is connected to the others. When assessing your strengths, you’ll highlight what you’re doing well — and think through how you might replicate that success in areas that you identify as weak spots. For example, if you’re doing a great job crafting messaging to media, you can transpose that same skill set to your internal messaging efforts.

But the most important thing about a SWOT analysis is how it helps you prioritize. A bit of internal soul-searching should help you more succinctly outline your communications objectives, strategies and tactics.

There are four steps to conducting and following through on a solid SWOT analysis, and by the end you’ll have a clear view of “what comes next.”

Step 1: Select your SWOT participants

A SWOT analysis is a great opportunity to bring together your communications team and your key internal stakeholders. In my mind, bringing together these parties has always served a dual purpose. First, it’s a stealthy way to educate other departments and functions in my organization about what communications is all about. Second, it helps
them understand the strategic nature of the practice. Involving others gives you the important interdepartmental input you need and helps you build relationships, create brand ambassadors, and win over brand assassins within your organization.

<table>
<thead>
<tr>
<th>Helpful</th>
<th>Harmful</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Internal</strong></td>
<td></td>
</tr>
<tr>
<td>Strengths</td>
<td>Weaknesses</td>
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<tr>
<td><strong>External</strong></td>
<td></td>
</tr>
<tr>
<td>Opportunities</td>
<td>Threats</td>
</tr>
</tbody>
</table>

Who are the right internal stakeholders? (Tip: You should have identified them in your stakeholder mapping.) Here are a few suggestions:

- Who in your organization is affected by or relies most heavily on your work?
- Who is most closely linked to your target audiences?
- Who has to deliver the messages you develop? (Who are your spokespeople?)

**Step 2: Assess**

Once you’ve identified the right people to involve in your SWOT analysis, book time on their calendars and grab some sticky notes, pens and a room with a whiteboard or a good wall. (Allow at least 45 minutes, and expect that it may take two or three 45-minute sessions to complete the process.) In my experience, the best way to gain input from your internal stakeholders is to set up an interactive brainstorm session. You could start with your communications team and then do another session with your internal stakeholders. To decide how and whether you divide your participants, consider the size of the group and the dynamic of the different players in the room.
In a brainstorm session, everything counts. When you’re doing a communications SWOT, you’re looking at and asking questions of the communications planning phases and program elements.

Your Strengths and Weaknesses are *internal* to your organization: what you do well, and where you might need to do some toning. (This can be an emotional process, but it’s worth it: this is how you improve your planning efforts.)

Opportunities and Threats are *external* to your organization: Ask yourself, what or who is available to us that we haven’t considered, and what or who might keep us from maximizing our communications efforts?

Use the worksheet on the next page to help guide and generate the most information possible during the SWOT session.

**WORKSHEET – Assessing Your Plan Elements**

<table>
<thead>
<tr>
<th>Goal</th>
<th>Audience</th>
<th>Messaging</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do we have a goal? Is it aligned with organizational needs? If not, why? What are we risking by not setting goals for our communications efforts?</td>
<td>Have we reached our target audiences? How do we know? Do we get feedback? When? When do we not?</td>
<td>Are our messages developed with key internal stakeholders? • When do we get their input? • Is it proactively or reactively?</td>
</tr>
<tr>
<td>How has our goal impacted the strength of our communications efforts?</td>
<td>With which target audience are we most effective? Least effective? How do we know?</td>
<td>Where do our messages resonate the most? Least? How do we know?</td>
</tr>
<tr>
<td>Where have we been focused for the last 1–2 years?</td>
<td>If we don’t know, what do we need to examine/ask/research to give us more confidence about our assumptions?</td>
<td>Are there activities and successes within our organization that would be great to communicate, but that we haven’t capitalized on?</td>
</tr>
</tbody>
</table>

Here’s a **simple approach and checklist** for a SWOT brainstorming session:

**PRE-SESSION**

- Identify (by name) your key internal stakeholders to participate in the SWOT brainstorm session.
- Secure a meeting room or quiet space and gather the tools you will need (tape, sticky notes, markers or pens).
- Send calendar invitations.
**DURING SESSION**

- □ Draw a SWOT grid on the wall (with tape) or on a whiteboard.
- □ Provide a printout of the “Assessing Your Plan Elements WORKSHEET” for reference.
- □ Pick a timekeeper. Brainstorming under time pressure often creates amazing outputs, and it also shows respect for the time of your participants.
- □ Communicate the intent of the session and the expected output so everyone is on the same page.
- □ Set ground rules (i.e., communicate the timeline, make it clear you’re focusing on communications activities, nothing is off limits, think broadly, etc.).
- □ Provide everyone with sticky notes so they can write their ideas down on paper. Start with Strengths, followed by Weaknesses, Opportunities and Threats.
- □ Set the timer and GO!
- □ 30-minute mark: Ask your participants to map their sticky notes in the SWOT grid. Allow participants to read each note posted by the other participants.
- □ 35-minute mark: Ask your participants for feedback or immediate epiphanies they had during the thinking and posting process.
- □ Thank everyone for participating and remind them of the next session — where you’ll work together to review the prioritized (and summarized) key findings to ensure everyone is on the same page.

**Step 3: Prioritize**

Once you’ve captured as much as you can, the next part of the SWOT process involves prioritizing and focusing on what’s most critical. This is where you weed through all the information your participants have mapped to the four SWOT areas. (Keep in mind, your prioritization should be based on the needs of your organization and its intentions for defining its brand.)

Let’s take target audiences as an example. If you’re limited on resources, you may decide not to alter the way you communicate with the media. But as a result of the first SWOT session, you realize that your internal communications efforts need a boost — and this is something you have the resources to handle. So for the next year you prioritize internal communications.

Prioritizing is about asking yourself what’s most important and whether there are any glaring hotspots. This is also a good time to bring back your internal stakeholders to validate your prioritization and provide additional insights.
Step 4: Synthesize to develop a situation analysis

Once you have assessed and prioritized, it’s time to write a situation analysis. This is a report that includes the results of your discussions and how you’re thinking about addressing them (but doesn’t necessarily go into firm conclusions; you’ll get to those when you develop the communications plan). Your report should outline what you have researched, what you find most important, and where you expect to focus when you get into the hard work of planning.

In addition to synthesizing the information you’ve gathered, a situation analysis is also another opportunity to prioritize, fine-tune and harness all the insights gained earlier. As well, it informs other people in your organization about communications efforts, the findings of your “internal soul-searching,” and possibilities for addressing the issues that were raised.

I’ve provided a template here for you to use when developing a situation analysis. When your report is complete and circulated, you’re ready to dive into the fundamentals of planning for success.

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SITUATION ANALYSIS TEMPLATE

**Section 1: Introduction**
- The purpose for conducting the SWOT.

**Section 2: Process**
- Who was involved and what was assessed.

**Section 3: Key Findings**
1. Internal communications strengths and weaknesses
   - Outline strengths and weaknesses captured in the SWOT analysis.

2. External environment
   - Outline external opportunities and threats that may or will impact your organization’s ability to achieve your organizational goals.
   - Include insights from the research phase of the planning process: your organization’s reputation in traditional media and social media, and/or target audience insights.

3. Target Audience Analysis
   - Outline insights gathered about target audiences or key stakeholders from the research phase of the planning process.
4. Competitive Analysis
   - Allies, competitors or assassins: outline their communications footprint, their ability to deliver messaging and how they may impact your activities.

Section 4: Summarize Possible Solutions
   - Address possibilities and solutions, but don’t necessarily establish conclusions; that will happen during development of the communications plan.

Section 5: Conclusion
   - Summarize next steps.

Case Study: How ‘Feed the Children’ Refocused From the Inside Out

Feed the Children is a 35-year-old nonprofit organization dedicated to ending childhood hunger. When Kevin Hagan assumed the role of CEO two years ago, he immediately recognized the opportunity to increase Feed the Children’s relevance in the nonprofit space in general, and specifically in the anti-poverty and anti-hunger sectors.

To better communicate its mission and values to the world, Feed the Children launched repositioning and rebranding efforts guided by findings from a SWOT analysis, focus groups and extensive market research. Their qualitative and quantitative analysis provided a clear picture of how their employees, donors (cross-section of all American donors) and community partners viewed their work and messaging and the work of other, comparable nonprofits.

As a result, Feed the Children found there were many myths associated with the organization. For example, the research indicated that nearly 80 percent of people surveyed viewed it as an internationally focused organization, when in truth more than 60 percent of its funding was directed to U.S.-based programming. This and many other findings affirmed the necessity for shifting the perception and beliefs of many stakeholder groups.

Leveraging a new brand platform, Feed the Children’s communications and community-based efforts reflected Hagan’s mission to re-envision the organization as a “next-generation charity.” The organization is now focused on uniting the whole anti-hunger sector and engaging in new programming, collaboration and stakeholder engagement that will finally defeat the status quo of hunger. Initial feedback from donors, partners and volunteers has been very positive.
Truly Understand Communications Planning Elements
Truly Understand Communications Planning Elements

If you don’t invest in planning, you end up with a haphazard initiative that falls short of your desired results. Too often, organizations fail to take the time to plan properly.

Until now — understanding your starting point, honing in on your target audience, and going through a SWOT analysis and situation analysis — you have been planning for the plan. Now it’s time to make a formal plan, but as you do so it’s important — even for seasoned communications practitioners — to understand the language and key elements of the planning phase: Mission, Goal, Objective, Strategy and Tactic.

Planning Elements at a Glance

We’ll look at the definitions for each planning element, and as we do so we’ll consider a very simple example. My approach is based on the Accredited Public Relations designation process put forth by the Public Relations Society of America (PRSA). The PRSA developed this process in order to create some consistency within the industry, and it’s something I walk through with my business partners (not just communications practitioners) when we start the planning process. That way, we all understand each other from the beginning. It also helps them translate business goals to business objectives and makes it easier for them to plan.

The diagram here demonstrates how to start with something specific and build from there, with each subsequent level supporting the one above. Ideally, the Goals and
Objectives should align with what the business overall wants to achieve, while the Strategies and Tactics will focus on what communications can bring to the table. This is where we start to see the channels and the tactics within those channels come alive.

Planning Elements Defined

**Mission or Purpose** – the overarching reason that the organization came into existence; a visionary statement that can guide the organization’s planning for many years.

*Example:* To end world hunger.

**Goal** – A more specific expression of a mission or purpose. Often related to one aspect of the mission or purpose. Commonly described as the desired outcome of a plan of action.

*Example:* To introduce the people of developing countries to multi-yield agricultural practices.

Mission and Goal

Your Mission is the overarching reason your organization is in existence. It’s that visionary statement that guides your organization for years at a time. It’s key that everything you do in communications moves you closer to fulfilling your organization’s mission.

The Goal is a more specific expression of your organization’s purpose as it relates to an explicit problem.

Let’s imagine a nonprofit: Operation Stop Hunger. It has developed its strategic business plan and clearly defined a mission — to end world hunger. The team has also conducted research and a SWOT analysis, and by doing so they’ve identified the application of multi-yield agricultural practices as the most important way to help developing countries effectively end hunger. That’s their goal, the desired outcome of their plan.

A quick side note before continuing: Your organization may have multiple goals. For example, take my organization, the Michael & Susan Dell Foundation. Our mission is transforming the lives of children living in urban poverty through better education, health and family economic stability. Our three focus areas are Education, Childhood Health and Family Economic Stability — and each of these point to a different goal.

From each of these goals we build out objectives, strategies and tactics, forming the pyramid shape you saw earlier (“Planning Elements at a Glance”).

**Education**

Improving student performance and increasing access so that children and adolescents everywhere have the opportunity for life-long success.

**Childhood Health**

Enabling timely health interventions that can mitigate a number of common childhood afflictions and increase the likelihood of children to stay in school and live longer lives.

**Family Economic Stability**

Through microfinance, giving underprivileged children a chance at stable, productive adult lives.
Objectives

Your Objective helps you measure your progress against your defined goal. It must include a desired outcome, target audience and time frame.

Planning Elements Defined

Objectives – Specific milestones that measure progress toward achievement of a goal, and should include desired outcome, public(s), level of accomplishment, time frame.

- **Outcome objectives** change behavior, awareness, opinion, support.
- **Process objectives** serve to “inform” or “educate.”
- **Outputs** measure activities, e.g., number of contacts or news releases. Output can help monitor your work but can’t measure the effectiveness of a campaign.

*Example:* To have confirmed reports that 50% of the citizens of one Asian, one African and one South American developing country are applying multi-yield agricultural practices by 2015.

Based on their goal, Operation Stop Hunger defined their objective as **introducing people of developing countries to multi-yield agricultural practices**. Their desired outcome is 50 percent of their target audience embracing multi-yield agricultural practices; their target audience is the native populations of developing countries in Asia, South America and Africa (one country on each continent); and their time frame is the year 2015.

Objectives That Can Be Measured

**QUANTITATIVE**

**Outputs**
- Volume of Stories
- Reach (circulation/audience)
- Volume of Stories in Target Media
- Media Mix
- Message Delivery (track % for each individual message)
- Quality (Algorithm Score)
- Prominence (Headline/Lead Paragraph mentions)
- Target Media Reach (circulation/audience)
- Company Spokesperson Citations
- Tone (% of Positive Stories Delivered)
- Third-party Endorsements (analyst, expert, celebrity)

**QUALITATIVE**

**Outcomes**
- Awareness
- Comprehension/Understanding
- Attitude & Preference
- Actions & Behavior

**Business Results/ROI**
- Revenues
- Market share
- Employee retention
- Profits
- Regulatory actions

This particular objective is an “outcome” objective: Operation Stop Hunger is trying to change the behavior of its target audience. There are two other kinds of objectives: a
“process” objective serves to inform or educate target audiences, and an “output” objective measure activities and is, therefore, typically quantitative in nature.

Outcomes are the most desirable and important type of objective, because they demonstrate whether and how you’re impacting your audiences. For these same reasons, they can be quite costly. Outputs are less expensive and easier to measure — and, as the chart below makes clear, you can use outputs to inform and achieve outcomes.

Your desired outcomes (right side of the chart) will be things like “increasing awareness” or “changing attitudes.” Clearly, these are not easy to quantify. But when you break those outcomes into different outputs (left side of the chart), you give yourself results you can measure. For example, if your outcome objective is to:

- Increase awareness, then you should make sure you’re focusing on overall volume of stories, volume of stories in target media, and media mix.
- Enhance understanding, then you’ll want to focus on message delivery and quality of coverage.
- Improve attitude/preference, then you should focus on measuring tone, target media and third-party endorsements.

Quantifying outputs is fairly easy and doesn’t usually require very sophisticated tools. Quantifying outcomes is definitely possible, but more intensive. It requires conducting focus groups or surveys prior to, during and after a campaign.

Also on the qualitative side of the chart you see Return on Investment (ROI), which you can measure by tapping into your organization’s data — revenues, market share, profits, etc.

Communications is always challenged to justify and measure its activities in terms of ROI. Sometimes you get lucky, and communications is the only discipline supporting an announcement or initiative. Then you can easily measure results and tie them specifically to your activities. One of my favorite examples of this comes from my old stomping grounds, Nokia.

Nokia had plans to release a tablet device that had only Wi-Fi communications support. Assuming the media would dwell on this connectivity issue and cover the device negatively, the team elected not to execute on traditional media relations initially. Instead, they decided to host two small events for the consumers most likely to appreciate the compact internet-enabled device: bloggers. The most influential bloggers in SFO and NY were invited to sit down with the devices, as well as with company executives, and provide feedback. As expected, they blogged about the device and the event favorably. What we didn’t expect (back in 2007) was that major media were following these bloggers. The positive blog coverage led to favorable coverage in major media over the next several days, and as a result, the device sold out before it even made it to market. It was outstanding ROI, and it could all be attributed to the strategy and effort of communications.

Sometimes, though, it isn’t that clear cut, because you may have advertising support
alongside your communications activities. In this situation, you need to be organized and look at last year’s data — e.g. how was your volunteer recruitment last year? What about donations? Last year’s data gives you a baseline against which you can measure this year’s results. And when you roll out a campaign, try to time your communications, advertising and events in phases, so you can see which instances of outreach are getting traction with your target audience.

Today, technology has given us plenty of ways to isolate impact — QR codes in advertising, a unique URL for media relations, a special offer or code for social media posts, or an invite to an event. If you can set up independent ways of measuring which discipline is having the greatest impact, you’ll be able to say, “Do more of this and less of this,” and you’ll demonstrate the value of your executions and of communications in general.

**Strategy**

This is the most creative part of the communications plan — where the “rubber hits the road.” Once you’ve defined success clearly, laid the groundwork with a thorough situation analysis, and developed a clear sense of who your specific audiences are and what they value, you’re ready to develop strategies for delivering your messages. Basically, strategies are the ways you will achieve your objective(s). Finally, you’re at the WHAT part of the process!

**Planning Elements Defined**

<table>
<thead>
<tr>
<th>Strategy – A general, well-thought-out approach to reach objectives. Strategies do not indicate specific tactics to achieve objectives. There can be multiple strategies for each objective.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example:</td>
</tr>
<tr>
<td>• Build trust by positioning Organization Stop Hunger as an expert on the benefits of multi-yield agricultural practices.</td>
</tr>
<tr>
<td>• Leverage influential farmers to encourage others to implement multi-yield practices.</td>
</tr>
<tr>
<td>• Create visual and verbal communications vehicles that can be understood by a population with limited education.</td>
</tr>
</tbody>
</table>

In our example, Operation Stop Hunger has defined three different strategies targeted at different stakeholders:

1. Build trust with **farmers** by positioning Operation Stop Hunger as an expert on the benefits of multi-yield agricultural practices.
2. Leverage **influential farmers** to encourage others to implement multi-yield practices.
3. Create visual and verbal communications vehicles that can be understood by a population with **limited education**.
Tactics

Tactics are the specific activities that help you execute your strategy. This is HOW you’re going to execute your strategies. Once you’ve defined your strategies, the tactics come easily.

Planning Elements Defined

**Tactics** – The *specific activities conducted to implement strategies* of a public relations program. Tactics achieve the objectives and, in turn, support the goals that have been set to carry out the mission or purpose of the organization.

**Example:**
- Influencer Relations – Educate the five most influential farmers in the top 20 Chilean farming villages during year one about the benefits of multi-yield agricultural practices and its success both in other Latin American countries and around the world.
- Community Relations – Design, produce and distribute flash-card pictorial training materials for volunteers to teach the techniques and benefits of multi-yield agricultural practices.

But, as anyone planning a communications effort knows, it is often easy to confuse strategies and tactics. Going back to your definitions is important.

One communications strategy (or initiative or campaign) may involve dozens of tactics. And the same tactics may be employed in all sorts of campaigns — though perhaps in different ways, and to different ends.

Among other tactics, to execute its strategies Operation Stop Hunger will focus on Influencer Relations and Community Relations. Details about these tactics are in the chart.

Checklists and Resources

Now you have a solid definition for your Situation Analysis, Target Audiences, Mission, Goals, Objectives, Strategies and Tactics. The checklist provided here can help you keep each step straight as you plan and engage in the process. On the list I’ve italicized Mission as a reminder that you may want to physically include it in your plan; everything should tie back to your organization’s mission, so everyone involved in planning should remain cognizant of what that mission is.

Approach is italicized simply to remind you that if you need an interim step or phased approach to get you through a multi-year plan, use this. You could start to develop your plan. The reality is no two plans are ever the same. Some may be best suited in Word and others in PowerPoint. In order to decide that, determine what your organization’s style is and what would help you to best communicate to others what you are going to do.

- Situation Analysis (Research Summary)
  - Competitive analysis
  - Target audience analysis
  - SWOT analysis
□ Target Audiences
□ Mission
□ Goals
□ Objectives
□ Strategy
□ Approach
□ Messaging
□ Tactics/Programs
  • Internal Communications
  • Media Relations
  • Social Media
  • Executive Visibility
  • Influencer Relations
  • Etc.
□ Monitoring, Measuring & Reporting

S.M.A.R.T. CHECKLIST

Here as well is a checklist to use for assessing objectives. It’s a simple way of spelling them out (S-M-A-R-T) and holding your strategies accountable.

<table>
<thead>
<tr>
<th>Criteria to assess objectives</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. <strong>Specific</strong> – Does it describe what you want to accomplish? Do you use action words? Is it clear, concise and tangible?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. <strong>Measurable</strong> – Can you quantify the results? How will you know when the objective has been completed?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. <strong>Achievable/Attainable</strong> – Do you feel you can achieve the objective by the target date? Can you get support from others? Do you have access to everything you need?</td>
<td></td>
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</tr>
<tr>
<td>4. <strong>Relevant</strong> – Will this objective have an effect on the desired goal?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. <strong>Time-bound</strong> – Does your objective indicate when it needs to be completed? Does it relate to a single result? Is it clearly written?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Finally, here are some links to free resources that can help you develop objectives and learn more about tying them to strategic communications planning:


Conclusion

We’ve only scratched the surface, but *4 Steps Every Nonprofit Should Take Before Creating Its Strategic Communications Plan* should help you standardize your approach to planning, remain strategic in your efforts, and gain a seat at the table in your organization. Again, those four crucial steps are:

1. Understanding Your Starting Point and Your Environment
2. Honing In on Your Target Audience
3. Conducting a Proper SWOT and Developing a Situation Analysis
4. Truly Understanding Communications Planning Elements

What now? There are still many components to address: messaging, metrics and analytics, and specific strategies like content marketing or social. Watch for additional resources coming soon!

I encourage you to share this resource with any of your community partners or collaborators in the nonprofit space. I also encourage you to send us your feedback.

Click to share your thoughts about this guide with us.

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