

Developing An Effective Communications Plan

A collaboration with Volunteer Alexandria,
Volunteer Arlington, Volunteer Fairfax, and Loudoun
Cares

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Learning Objectives

Upon leaving here you will have learned:

- A structured way to develop a messaging campaign
- How to see this campaign as part of a communications portfolio
- Understand the value of both in terms of improved execution and the ability to communicate within your organization (ie. to your boss) about your plan.

Agenda

- Introductions & Orientation
- What is a **Communications Plan**?
- Identifying the **Purpose**
- Identifying the **Audience**
- Choosing the right **Platforms**
- Designing the **Message**
- Planning for **Emergencies and Contingencies**
- Planning for **Internal Communication**
- Creating an **Action Plan**

Introductions

- A few quick sentences:
 - Your name
 - The organization you work with
 - What your role is
 - A fun fact about you

A Note on Brevity

Today we'll be covering many **complex topics** in a very short amount of time.

If you have **questions**, or want more detail, please contact us. We're always happy to talk.



What is a Communications Plan?

What is a Communications Plan?

- A structured way of communicating a message, that can be used throughout an organization.
- Key points:
 - It is documented, and can be used by anyone who needs to use it.
(It's not just "in someone's head")
 - It defines what resources will be used, and takes the limitations of those resources into account.
 - It is clear who will be performing which roles, and when they will be doing that.

What is a Communications Plan?

- More Key points:
 - The **audience** and **purpose** are defined
(It needs to be accessible to anyone, even if there is turnover in staff or volunteers)
 - The **tools** and **methods** are defined
(It needs to define the right tools for the audience and purpose)
 - The plan for **internal communication** is defined
(A plan isn't very good if no one knows about it or follows it)

What is a Communications Plan?

Even More Key points:

- Portfolio vs. Plan vs. Campaign
 - Your communications **portfolio** is a summary of all the communications you use, and why you use them.
 - A **campaign** is how you will get a specific message in your portfolio to the right audience.
 - A **plan** is how you make your **campaigns** match your goals set in the **portfolio**, in a way that is effective with the resources you have.
- The **plan** is the most important part:
It integrates what you want to say with how you should (and will) say it.



Identifying the Purpose

Identifying the Purpose

“Why are we even doing this?”

- Before starting any communications plan, determine the **general purpose**.
 - Bragging about an achievement
 - Recruiting new donors
 - Engaging volunteers
 - Recruiting volunteers
 - ... etc.
- Then, **refine** in these into very specific terms.

Identifying the Purpose

- **Refining** the purpose into specific terms
 - *Bragging about an achievement* becomes:
“We want our sponsors to know that their money was spent well, and how it was spent”
 - *Engaging volunteers* becomes:
“We want our volunteers to know what their work has accomplished, and how they can do more.”

Identifying the Purpose

- **Identify** what you will **measure**
 - Decide in advance what will make the project successful or not, and how you will measure that.
- **Examples:**
 - Number of new visitors on your website
 - Increase in donations
- Identify **how** you will measure these

Activity: Identifying the Purpose

What are you communicating?

What does success look like?

How will you measure success?



Identifying the Audience

Identifying the Audience

- Identify who, exactly, are you speaking to?
 - Your donors?
 - Current volunteers?
 - Potential volunteers?
- This should be based on the goals you decided when you identified the purpose of the campaign.
- You can have multiple audiences, but each should be very specific.
- Make sure to document each audience in your plan.

Identifying the Audience

- Once you have identified the audiences, be sure to consider:
 - How they prefer to receive communications
 - How they might prefer to receive the specific communication you are sending
 - Types of messages that will get the best response
- If you have data, **use it!**
 - Don't let your data collect dust. It is a valuable tool for creating effective communications.

Activity: Identifying the Audience

Who are you talking to?

How do they like to receive info?

How have they responded in the past?



Choosing the Right Platforms

Choosing the Right Platforms

What is a “Platform”?

It's a generic term to describe how you get your message out. It could refer to Twitter, phone campaigns, canvassers, or any other form of communication.

Examples of platforms are:

- Social media
- Email
- Phone calls
- Networking by board members
- ... and many others

Activity: Choosing the Platform

How do they prefer to receive info?

What platforms will get the best response?

What might be a bad platform for our purpose?

Choosing the Right Platforms

- **Synchronous** (*real-time communication*)
Advantage: better interpersonal connection
Disadvantage: more staff/volunteer time
 - Phone calls
 - In-Person Meetings
- **Asynchronous** (*when the audience chooses*)
Advantage: large-scale comms with low effort
Disadvantage: less personalized connection
 - Email
 - Social Media

Choosing the Right Platforms

- When to choose a **synchronous** platform
 - When the value of the communication is much larger than the staff/volunteer cost.
(Sponsorships are one example)
- When to choose an **asynchronous** platform
 - When the communication should reach the widest possible audience at the lowest possible cost.
(Emails and social media are examples)

Tempo: Choosing the Right Timing

- What is the right **timing** for your comms?
 - Daily?
(Volunteers or attendees at an event)
 - Weekly?
(Upcoming events)
 - Monthly?
(New accomplishments and activities)
- The platform determines the timing

Tempo: Choosing the Right Timing

- Tempo:
What is the right **timing** for your comms?
 - What does your **audience** need to know and **when** do they need to know it, so that they can complete the **action** that you've decided?
 - How often do they need to be reminded of it?
- Things to think about:
 - Donor/Sponsor Budget Cycles
 - Event Advertising
 - Budget Approvals
- Always put yourself in their place.
*(If I were in their shoes, what would make it easy to say "yes" and complete this **action** right now?)*

Tempo: Choosing the Right Timing

- Tempo:
What is the right **timing** for your comms?
 - It can't be too early
(People will forget)
 - It can't be too late
*(People may not get approval in time,
or have schedule conflicts)*
 - It can't be too often
(People will get annoyed)
 - It can't be too infrequent
(Your message will be lost in the noise)
- Think critically! **(And use data if you have it)**

Choosing the Right Platforms

- Consider both the **audience** and **purpose** when choosing a platform.

The key questions should be:

Will the person I'm communicating with:

- *Receive my communication?*
- *Understand what I am asking of them?*
- *Take action?*



Designing the Message

Designing the Message

- The message **must** be **action-oriented**
*Give them something specific,
that they can do **right now***
- A typical reader spends less than 15 seconds on an email, and far less in other media.
- Pay attention to microcontent, since the first few seconds of attention are crucial.
- Give your reader/listener something to do.
- Remember its not just content, its also tone.

Designing the Message

- Microcontent:
 - The tiny bits of media that help someone decide if they will engage with the rest of the message.
 - People are busy, and make quick decisions on what they will engage with.

Bad example: “January 2017 Newsletter”

Better Example: “You Can Continue Supporting Local Youth – Read About the Work We’ve Been Doing.”

Designing the Message

- Designing an Action:
 - All communications should have an action, even if the action is just “read and understand this.”
 - This action should align to the **purpose** and **audience** that you decided.
 - All communications should give recipients an **easy way to complete the action.**
 - The action should be appropriate to the audience, platform, and purpose.

Designing the Message

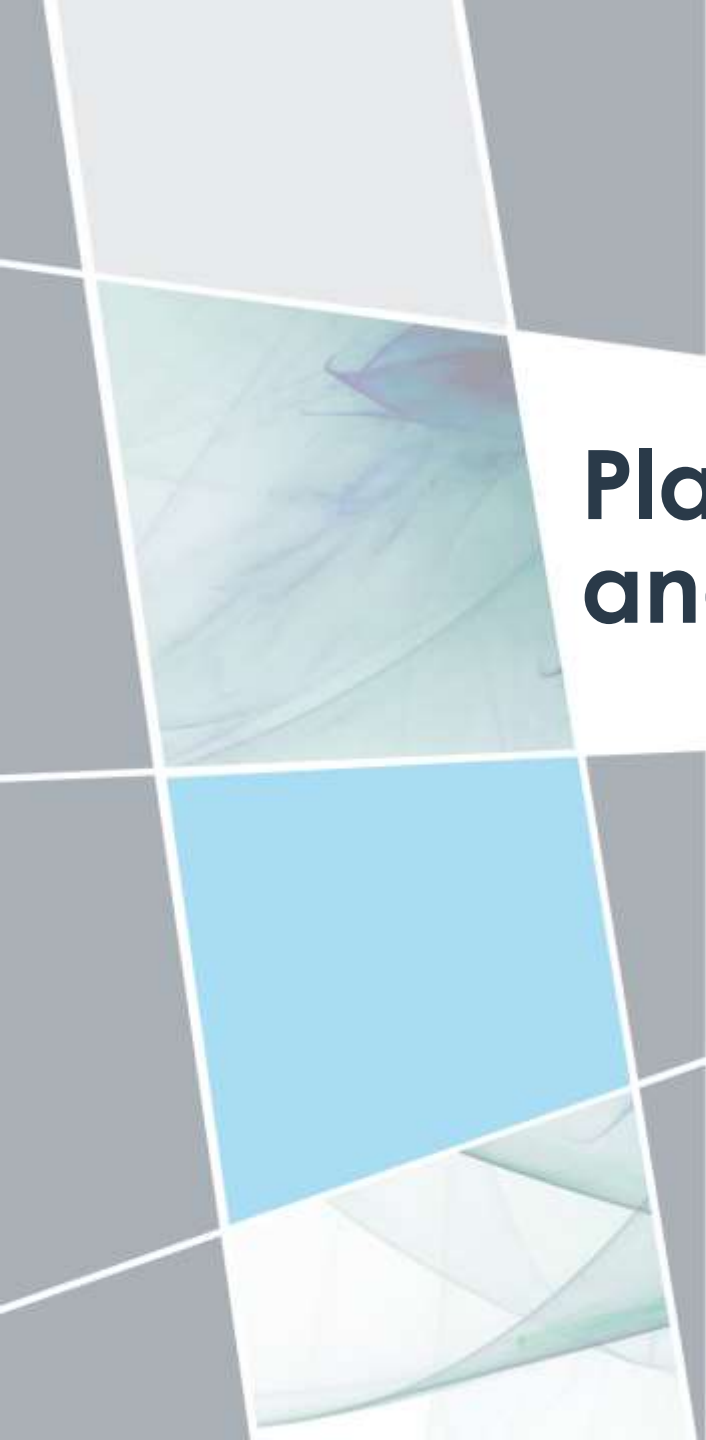
- Designing the Communication
 - Identify the stakeholders
(who will care?)
 - Identify who will need to approve the message
(who will need to sign off?)
 - Craft the message
 - Prepare the message and get approvals *before* it is sent out.
- **Test Your Message**
(It is easy to assume that external users will engage in the same way as internal users): “The ‘Mom’ test”

Activity: Designing the Message

Develop a sample message

Develop the micro messages

Validate



Planning for Emergencies and Contingencies

Activity: Contingency Planning

How has a communications strategy gone wrong for you in the past?

Planning for Contingencies

Things go wrong. A communications plan has to plan ahead for what might go wrong, and have a backup in place.

Examples:

- Email systems fail
- Phone systems are overloaded
- Adverse news events
- Natural disasters
- Human error
(e.g. embarrassing typos, or worse)

Planning for Contingencies

- **Think critically** about what might go wrong
- Red Teaming is a good strategy
(An internal team who knows the process and can identify where it might fail)
- Remember: no one is too smart to make a stupid mistake

Planning for Contingencies

- Consider everything that could go wrong, and write it down. This is your **Risk Register**.
- Discuss your Risk Register with stakeholders to identify which of the top 10 risks are most likely to occur.
- Document a backup plan for each of these.
- For the top 3 risks your team identified, develop at least 2 backup plans.
(Plan B might fail, and you'll want to have a plan C)

Activity: Contingency Planning

How could you mitigate the “what goes wrong” list?



Internal Communication

Internal Communication

- A plan is useless if it isn't followed
(and not everyone will know that there is a plan)
- Internal communications are needed
 - Communications to senior leaders
 - Communications to board
 - Communications to volunteer leaders
 - Communications to staff
- The plan should be communicated **before it is executed** so that everyone is on the same page.

Internal Communication

- Three versions of a plan may be needed
(The same plan, but for different audiences)
 - A detailed spreadsheet
(for people who will be supporting the plan, or be effected by it)
 - A campaign plan
(guidance and doctrine for people who will be doing the actual work)
 - A narrative plan
(for people who need to be aware of what's happening)

The Communications Portfolio

Message	Purpose	Audience	Action	Platform	Tempo
Our annual event is coming soon, and will be a great opportunity for you to build your business	Sign up now to sponsor	Potential Sponsors	Sponsorship Signups	Phone calls	Every other week
We helped 3,000 at-risk children this year. Your support is creating real change.	Learn more about our work	Current Supporters	Continued Engagement	Emails	Once

Internal Communication

■ The **Narrative Plan**

A quick summary that anyone can read and understand, even if they don't have the time or interest in the details.

(Good for executives and other departments)

- A brief (!) summary of:
 - **What** you plan to do
 - **Why** you are planning to do it
 - **Who** you will be talking to
 - What **resources** you will need
 - How you will measure success

Classic “who, what, when, where, why, how”
... but with an addition: how well?



Close-Down

It's been a blast...

- Questions?
- Lightning Round: What did you learn? Did we hit the objectives?
 - ✓ A structured way to develop a messaging campaign
 - ✓ How to see this campaign as part of a communications portfolio
 - ✓ Understand the value of both
- Diagnostic
- Additional Support
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