STRATEGIC
COMMUNICATIONS
PLANNING

Your comprehensive guide to effective strategic corporate communications planning

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OVERVIEW

OVERVIEW

Is there such a thing as an ideal communications plan template? What would it look like?

I've spent most of the last 10 years surrounded by communications and marketing plans.

I studied them at university, proposing reasoned solutions (at least in my mind) to other peoples' problems.

I worked briefly in marketing and communications in the private sector in the UK, before moving to Canada.

Once in Canada I joined the public service and initially spent a lot of time reading other peoples' assessments and edits on communications plans and learning from them — what worked, what didn't work, where people repeatedly left gaps and what made a good plan.

Eventually I found myself in a position where I had the opportunity to provide input on communications plans myself. I even helped to develop training on communications planning. I then decided to move down from the macro level to the assembly line, writing plans and executing them myself.

I've now moved to the agency side, approaching the process from a different angle again.

This variety of positions has given me an interesting perspective on communications plans and what they should look like.

THE CONTENT OF A COMMUNICATIONS PLAN

Let's start by looking at the general sections of a communications plan.

Here's what I've used when planning a communications initiative, in roughly the order I approach them. Not all of them are always necessary. This is the broad list:

- **Context** — what's happened before? What's the history?

- **Environmental Scan** — what are the key factors that will affect your success? What is the media saying?

- **Stakeholders** — your stakeholders and their expected reactions. How you will manage them?

- **Objectives** — what do you want to achieve? (should be clear, relevant, measurable... use the SMART approach if you like)

- **Strategy** — where are you going, and why?

- **Audiences** — who are the key audiences?

- **Announcement** — given the strategy, are you making an announcement? What are you announcing?

- **Messages** — what are you saying about the announcement?

- **Tactics** — how will you implement your strategy, both before, during and after the main announcement (assuming you have one)?

- **Issues** — what problems may you have to overcome?

- **Budget** — what will it cost?

- **Evaluation** — how will you know if you've been successful?

ANALYSIS

CONTEXT

The first section of a communications plan I work on is the context.

Why?

Because it forces you to do two things:

- Boil what's going on down to a succinct summary.

- Focus on the topic on which you're about to write a plan.

SET THE SCENE

The "context" section of your plan focuses on setting the scene. This isn't about details of an announcement — you haven't reached the part where you decide what your communications objectives or strategy will be yet. This section is all about the background to your initiative.

This should be a relatively easy part of your plan to write. *If you know the subject* this can pretty much write itself. If you don't, you need to bring yourself up to speed. To write the context section, you need to know exactly what's going on.

PREPARE YOURSELF

A side effect of doing this first is that you can't launch into the other aspects of the plan without doing your background research.

Here are a few things to think about when you think about the context for your initiative. Note that they have an internal focus:

- What is the initiative about?

- What related announcements have you made?

- What are the timelines?
    - Is there an upcoming product launch/conference/deadline, etc?

- Are there any notable milestones?

- Who is involved?

- Who within your organization has a stake in this?

- What other organizations are involved in this?

- Do you have partners in the initiative?
    - Note: This isn't a stakeholder list - that comes later.

ENVIRONMENTAL SCAN

While your context section is about looking at what you're doing and setting the scene, your environmental scan is about looking externally at what other people are doing and saying.

The environmental scan is more than just a media scan, although that is a major part of it. You need to go beyond just the media to look at the broader environment and how you fit into it.

FRAME YOUR ANALYSIS

If you've ever studied business, you'll know a PEST (Political, Economic, Social and Technological) analysis is a useful way to begin to wrap your head around things. Consider the situation in each of these environments and the effects that they have on the context of your project. Don't stick rigidly to this format, though.

The SWOT format (Strengths, Weaknesses, Opportunities and Threats) framework is another useful way to view things. Strengths and weaknesses have a more internal focus, looking at your organization and your initiative. Opportunities and threats look externally.

Here are a few things to consider:

- What have your competitors done recently?

- What have your competitors done in relation to this topic?

- What's the legislative context?

- What are other jurisdictions doing? (This is especially important if this is a communications plan for within the public sector)

- What has the mainstream media said about this?
  - Which outlets (and journalists) have written about the topic?
  - What tone did they take? Positive or negative?

- What's being said online?
  - Who are the influential writers online on this topic?
  - How have they approached the issue?
  - What are the top search results for your company/product/topic?

- What economic factors come into play?

- What (if any) upcoming events/special dates might relate to this?

Don't fill your environmental scan with long-winded quotes from articles - summarize the gist of what they said. Page upon page of quotes doesn't help anyone.

Be brief and to the point.

STAKEHOLDER ANALYSIS

This is the last of your initial 'setting the stage' sections.

GETTING STARTED

You've already looked at the context for what you're doing and the broader environment it fits within. Now it's time to consider the people and organizations that have a stake in your initiative.

> *Note*: For the sake of simplicity I've put these first three sections — context, environmental scan and stakeholder analysis — in a specific order. In reality you may work on them concurrently and there's often overlap between them.
>
> For example, stakeholders may crop up frequently in your environmental scan. That's fine. What's important is that you think through all of these areas so you don't overlook something that may come back to bite you later.

While your entire plan should flow logically and clearly link different sections, your stakeholder analysis in particular will link to numerous other parts of your communications plan. Bear this in mind now and refer back to this section frequently when working on later parts of the plan.

Your stakeholder analysis should cover everyone who's truly affected by your initiative.

QUESTIONS TO ASK

Here are a few questions to ask yourself:

- What are the positions of each stakeholder on this initiative?

- How do you expect each stakeholder to react to what you're doing?
    - Look at your previous experiences with each stakeholder
    - Do you expect them to be outspoken?
    - Might they express their concerns privately or are they more likely to use the media?

- How might you use the support of those you expect to react positively?
    - Attendance at a potential media event?
    - Supportive quote in media materials?
    - Local angle on the announcement?

- How can you mitigate the concerns of those you expect to react negatively?
    - Can you brief them in advance?
    - Can you consult with them on what you're doing before announcing it widely?
    - How will you respond to their concerns if you can't mitigate them?

The most common gap I've seen in communications plans is a failure to identify potential negative reactions. Perhaps this is due to ignorance of how stakeholders feel about what you're doing. Perhaps it's due to wishful thinking — hoping that no-one will react poorly. Perhaps it's due to a desire to avoid telling superiors that you won't make everyone happy.

One thing is for sure though – if you know a person or group will react negatively to what you're doing, ignoring it is a bad idea.

The "ostrich approach" rarely works. You're not doing anyone favours by pretending people won't react negatively when you expect them to do so.

You'll often find that for a given initiative, a small percentage of stakeholders will be highly supportive and a small percentage will be ardently critical. If you picture reactions on a continuum, they're the groups at either end. There's not much you can do to change their opinions. The stakeholders you want to influence make up the 80% in the middle.

PLANNING

OBJECTIVES

As the old saying goes, you need to know where you're going before you can know how to get there.

Likewise, before you can plan out your strategy…

…before you even start to think about your media products or event…

…you need to nail down your objectives.

WHAT ARE YOU TRYING TO DO?

This section is where you lay out what you're trying to achieve with this communications plan. For example:

- Do you want to educate your customers?

- Do you want to build support or create demand?

- Do you want to get people to do something differently?

- Do you want to defuse a situation?

- Do you want to improve the search results for your company/product/executives?

- Do you want to improve your organization's reputation?

- Do you want to generate more online or offline news coverage?

Whatever you want to do, this is where you define it.

DEFINING YOUR OBJECTIVES

To fall back on an old mantra from business school, your objectives need to be:
- Specific
- Measurable
- Achievable
- Realistic
- Time-focused

In practice, I subscribe to the Manager Tools idea that if you hit two parts of a 'SMART' objective — the 'M' and the 'T' — you're almost guaranteed to hit the others. Make sure your objectives are measurable and time-focused. The specific, achievable and realistic characteristics will emerge from there.

Vague objectives are a common pitfall. Ensure you can measure them and you will be forced to be "specific." As for "achievable" and "realistic," if your objectives don't meet those two criteria you don't deserve to be writing plans for anything.

Business Objectives Don't Equal Communications Objectives

One of the hardest parts of this to get your head around is the difference between business objectives and communications objectives. It's important not to confuse the two. Remember — you can't take responsibility for the entire success or failure of the program.

In my view, it helps to include the business objectives for the initiative in your communications plan *in addition to* the communications objectives. Doing this helps you to make sure your plan supports the overall business goals rather than working on its own.

Use Your Analysis

The last three sections in this eBook were all about analysis. Don't let this go to waste. Look at how you expect your stakeholders to react. Refer to previous media coverage. Base your objectives in reality.

What's The Lasting Impression?

If there was one thing you want people to remember about this initiative, what would it be?

This doesn't have to be written like a key message, but it should capture the essence of what you're doing.

I first encountered the 'lasting impression' idea in communications plans a couple of years ago. I like it. It forces you to boil down what you're doing to one or two sentences that the 'average' person could understand. It's a great way to let the plan's reader know, in simple terms, what's going on.

That's an important thing to remember throughout your plan. You're writing this to help you plan an appropriate approach to this communications activity but you're also writing it to help others understand (and approve of) what you're planning. Bear that in mind throughout your plan.

As an added benefit of doing this, you'll learn how to explain the gist of your initiative simply. This is an essential skill for communicators.

STRATEGY

Now that you've figured out the objectives for your communications plan, you know where you're going. It's time to figure out how to get there.

Your strategy defines how you will achieve the objectives you've just identified.

If you've done your analysis and thought through your objectives properly, the strategy should flow smoothly from them. If it doesn't, you may need to go back and think a little more carefully about the sections that went before.

WHAT YOUR STRATEGY SHOULD INCLUDE

Profile

Start by thinking about your general approach to the initiative. Do you want to generate the maximum coverage possible or are you trying to minimize it?

Simply put, do you want this to be high-profile or low-profile?

Proactive or reactive?

You will often find that a high-profile approach goes hand-in-hand with being proactive, and vice-versa. However, that isn't necessarily the case.

Do you want to go out and drive the issue, or do you want to wait for customers and the media to come to you?

Stakeholders

Bearing in mind the stakeholders you identified earlier, in a general sense, how should you go about reaching them?

Will you reach out to as many as possible or just the key ones?

Will you communicate with them directly, through the media or perhaps through your website?

CONSIDERATIONS

Link to your objectives

You just spent time nailing down the objectives for your initiative. Don't waste that effort. Make sure your strategy fits with where you want to go.

Link to your analysis

Along the same lines as the point above, your strategy needs to fit with your earlier analysis. The easiest way to make sure it does is to draw clear, distinct lines between the two.

Don't confuse strategy and tactics

This is a common mistake and it's easy to make. Remember: strategy and tactics are different things. Don't get down to the level of exactly what you're going to issue/produce/hold at this point. It's tempting to do it and I've done it myself — potential news release headlines, blog themes, podcast topics, photo op visuals and more — but force yourself to focus on the big picture first.

Remember, though, that while strategy and tactics are different, they are closely related — the strategy helps to frame your future decisions, including those about tactics. The choices you make about your strategy now will have a decisive impact on those you make about your tactics later.

The strategy section of your plan really isn't brain surgery. You know what you're trying to achieve; the strategy is just a top-level map of how you're going to get there.

AUDIENCES

At this stage we've finished our analysis of the situation, set our objectives and decided on a strategy. Now it's time to decide our audience — in other words, who we're speaking to.

THINK BACK

It's time to decide who you want to reach with your communications.

Analyze the key groups or people you want to reach and what their needs are. Which stakeholders are key to this initiative? Who else do you need to consider? Who do you need to connect with for this to be a success?

Remember to refer back to your objectives and your strategy. Are you looking to reach a few narrow groups or a broader selection?

BE THOROUGH

Make sure there aren't any gaps in your chosen audiences. What angles haven't you thought of?

Think about why you're considering each potential audience. Where do they stand on this issue? Are they so opposed that they'll never be happy regardless of what you do (if so, maybe you should re-focus on the people who may be receptive to your actions)? How much do they know about this (that may affect your tactics later)?

You can draw your audience from a wide range of groups. Your stakeholder analysis is an easy place to *start*. Look back at what you came up with. Who are your targets within this?

Some other potential sources of audiences:

- Opinion leaders

- Professional/business groups

- Governments (other jurisdictions if you're working in the public sector)

- Industry analysts

- Your employees

- Online audiences (groups within social networks, niche communities or bloggers, for example)

- Interest/advocacy groups

- Media

BE PRECISE

If you're looking to speak to consumers (or, if you're in the public sector, "the public"), do your utmost to break that down and identify specific niches.

Whether that's by demographics, by interest, by previous purchase habits or whatever means appropriate, never leave yourself with "the public" or "consumers" as an audience.

Carefully narrowing-down the consumer segment you're targeting makes your job of selecting appropriate tactics much easier later. If you're hoping to reach middle-aged couples with kids, for example, you're likely to use completely different tactics than if you're talking to young men or seniors.

Just as with "the public" or "consumers," never use a general definition of "the media." Break it down. Look back at your environmental scan (funny how this all fits together, eh? Almost as if people have thought it through) and see who has written about this in the past.

Who is interested in this subject area? Not just publications, but individual journalists where possible (some publications, like the Economist, don't identify their authors).

Again, carefully defining your target consumer segment will help you to define your media. Make sure the two sync up.

If you're targeting bloggers or online communities, think carefully. Of course, you've already identified and engaged with the key bloggers or communities in your industry, right? That means you also know who is interested in this particular topic and who is likely to be receptive to your approach.

Don't just blast your press release out to every place you identify — just as you would with media, think about what they want, what their perspective is and whether you should even approach each of them.

Tailor your approach to each site — you've read their posts; you know who they are (including their names); you've engaged with them; you know what they're interested in and you know what's likely to get their attention. Don't blow it before you start through laziness.

While positive reviews in the blogosphere can be a great thing, bloggers are far more likely to turn around and complain publicly if they don't like your pitch than journalists are.

THINK AHEAD

Throughout, consider whether you may be able to leverage the support of any of your audiences ahead of any potential announcement, in preparation for planning your tactics later.

Your audience selection is critical to the success of your communications plan. Gap-filled or imprecise audience selection will lead to unfocused, ineffective communications. Conversely, well-defined audiences let you craft your messages and tactics appropriately to achieve your objectives.

ANNOUNCEMENT

By now we've set the stage, established our objectives and strategy and chosen our audiences. Now, at last, it's time to think about our announcements.

In your written plan, the announcement itself is a pretty brief section. It's effectively an executive summary of the plan — what you're doing and why you're doing it.

The "announcement" title can be a bit misleading if your objectives and strategy don't indicate the need for a proactive announcement. If you've chosen a low-profile, reactive strategy, you'll focus more on your issues management section.

As such, while this is the earliest you can start to work on this part of your plan, you may need (or want) to get to it later. I personally find it useful to have this as a one-pager to refer back to occasionally when I'm thinking about messaging and tactics later on, but this really is a section you can just as easily work on last.

> *Note:* The structure of your communications plan is better if it's not dictated by a rigid template. A good communications plan format will let the planner use the content they need to and not make them force unnecessary sections into the plan.

SUMMARIZE

Outline the nature of the announcement(s) you plan to make. You'll flesh out your messaging and tactics later so don't worry about those now.

You've done most of the work for this section already — don't reinvent the wheel. Pull much of the content for this from your earlier analysis. Treat this as an executive summary of what you've already written.

KEEP IT SIMPLE

While you've waited until late in the planning process to identify the announcement you're making, in all likelihood this will be the first thing that executives reading and approving your plan will read. As such, you need to capture exactly what's going on succinctly.

Try to identify the announcement you're making and why you're making it in one or two sentences and in plain language.

Remember: The executives haven't had the benefit of doing the background research you've done.

MAKE THE LINKS

You've already identified the context for this initiative; use that to briefly summarize here how this fits within your organization's broader activities.

BE HONEST

Don't "spin" yourself. It can be tempting to sugar-coat what you're doing in the plan, to try and give "good news," but you won't do yourself any favours by doing that. Call a spade a spade while you're planning and you'll do better in the long-run.

MESSAGES

Your analysis is done, you've figured out your communications strategy and you know who you're targeting. It's time to craft your messages. But where do you start?

Your key messages help you draft all your products down the road when you're executing your communications plan. They'll help you stay on track and make sure you're communicating the right things to the right people.

The messages will permeate all of your communications, so they'll also attract a lot of attention from decision makers. This will be under the microscope more than any other section of your plan. It's important you spend the time to get this section right.

This is all about what you're trying to tell people. If people take something away from your communications, you want it to be these messages.

Your key messages should:

- Communicate what you're doing and why you're doing it

- Communicate what will be different

- Fit with your objectives

- Speak to all of your audiences
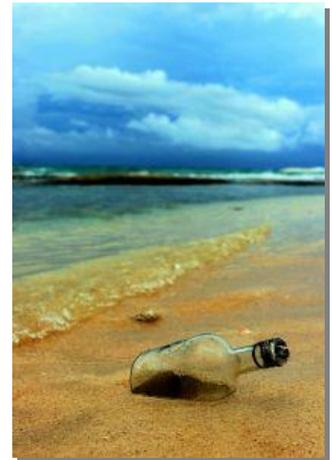
WHAT YOU'RE DOING AND WHY

The first message you'll usually draft is the main one that says what you're doing and why. You've spent time researching the initiative (ideally you've been involved in the planning for a while) so you know what the organization is doing and why it's doing it. Now you just have to get it down onto paper. Sounds easy but it can be surprisingly tough.

A few simple pointers:

- Focus on the main points - you don't need to get into detail here

- Be brief

- You're human; write like one

- Highlight the positive side of what you're doing, but don't mislead

- Decide what you want the stories to be about. Focus on that.

WHAT WILL CHANGE

It's much easier for people to understand what you're doing if you can give some context. Are you doubling money for a government program? Producing a product that's 50% better than its predecessor?

- Use before/after examples if appropriate

- Explain why people should care, in terms they care about

- Support your messages with facts if they're available

CONSIDER YOUR OBJECTIVES

Think about the objectives you've set. Whatever they are, write your messages to reflect that.

Are you trying to raise awareness for a product? Are you trying to get people to change their behaviours? Maybe you're trying to address a contentious issue.

Make sure you don't go off in a direction that ignores the reason for you doing all of this. It's easy to do if you're not careful.

INCLUDE ALL OF YOUR AUDIENCES

Some people like to write one set of messages for each initiative and tweak them for each purpose. Some like to create one long list that addresses everyone.

Personally, I prefer to look at each audience in turn and craft messages that meet their needs.

If you know one audience is going to have concerns about a certain aspect of what you're doing, make sure the messages for them specifically address that issue. Likewise, if they're looking for a certain feature in your new product then make sure that's highlighted. If you do this, you'll find you have much less resistance to your initiative from those people.

TACTICS

> "Plans are only good intentions unless they immediately degenerate into hard work."
> - Peter Drucker

You know your goals; you know what you're saying; you know who you're talking to. You need to decide how to say it.

How are you going to reach the audiences you've selected?

STAGED

It may help if you think of your announcement in three stages - pre-announcement, announcement and post-announcement:

- **Pre-announcement**: How will you pre-condition stakeholders/shareholders/consumers/the media ahead of your announcement?

- **Announcement:** How will you roll-out the initiative?

- **Post-announcement:** How will you sustain coverage after the announcement?

STRATEGIC

Just as all of the other sections of your plan fit together (your analysis flows into your goals and objectives, your stakeholders flow into your audiences, your strategy feeds off your objectives and so on) your tactics need to fit with your strategy.

If you've opted for a high-profile, proactive strategy, your tactics should clearly be very different to if you've selected a low-profile, reactive approach. Did you decide to communicate through the media, to/through stakeholders or directly to consumers?

Also consider your context and environmental scan. Do you need to raise awareness of the topic before you make your announcement?

If you follow the planning process properly, the process itself will help you to do this. By putting your tactics near the end of the process, you force yourself to consider the initiative from every possible angle. That means you're less likely to default to a (possibly) inappropriate news release and/or media event without thinking it through.

COMPREHENSIVE

Make sure you address all of your plan's audiences. Check and double-check that you aren't missing an important group.

A particularly useful tip: Create a table with your audiences down the left side and your proposed tactics along the top. Check which tactics hit which audiences. Make sure you address each audience with two or three tactics.

	Tactic #1	Tactic #2	Tactic #3	Tactic #4
Audience #1	✓		✓	✓
Audience #2		✓	✓	
Audience #3		✓		✓
Audience #4	✓	✓	✓	

If you see that you aren't addressing all of your key audiences, go back and consider how you can.

TACTICAL OPTIONS

Here are a few options to consider for the various stages. Remember that many of these may require their own plans:

- Story placements — proactive pitching; matte articles

- Mentions in other announcements/events

- Media events

- Regional announcements

- Speeches

- Paper products — news release (and/or social media news release), backgrounder, fact sheet

- Brochures, fliers

- White paper

- Follow-up announcements — milestones, results, openings

- Stakeholder consultations or events

- Letters to stakeholders

- Advertising — TV/radio/print/out-of-home/interactive

- Email newsletters

- Blogger relations

- Social network outreach

- Online community development/outreach

ISSUES

You've planned-out your announcement to perfection — your objectives, your strategy, your tactics.

Your communications plan is almost complete! But what if something goes wrong? What if journalists ask aggressive questions during an interview, or come out with a negative take on what you're doing?

Issues management is all about catching problems before they become crises. Your communications plan should help you to prepare for that.

It's rarely possible to anticipate everything that may come up, but with some careful thought you can usually catch most things.

In the communications plan format I've recently worked with, the issues section is often used as the basis of your media Q&As when you draft your products later. As such, we usually wrote them in a Q&A format.

This has the added benefit of making the issues easier for those further up the chain to understand:

> **Q:** What about X?

> **A:** Here's our response.

IDENTIFYING ISSUES

Think through your initiative and ask yourself a few questions:

- What is changing?

- Which parts are controversial?

- Are any advocacy groups paying attention to this?

- Who might not like it, and what might they not like?

- Are any stakeholders expecting something different?

- Have any aspects of this attracted media attention in the past?

- Which blogs write on this topic? What have they said in the past?

- Will this have an emotional impact on people?

- Will anything you're doing affect others directly? Have you (as an organization) talked to them about this?

- Are any parts of this hard to understand? What might need explaining further?

That's a lot of questions, but fortunately you've already done much of the work to answer them.

Read back through the other sections of your plan — through the context, the environmental scan and the stakeholder analysis in particular — with those questions in mind. You'll find many of the answers in there. Also talk to your subject matter experts – the people that are closest to the initiative - and ask them for their thoughts.

As with some other parts of the communications plan, you should think about your issues management section throughout your planning process and not just at the end. If you think of something that might crop up, write it down so you can include it later.

MITIGATING THE ISSUES

Once you've identified the potential issues, think about how you might be able to mitigate them.

Sometimes a simple Q&A will suffice for an issue. Other times you may want to revisit parts of your announcement (strategy, messages, audience, tactics etc) and tweak them. In some cases it may require more than just communications to resolve — you may want to go back to the subject matter experts and flag something for them to resolve before the announcement is made.

Working issues management into your entire plan will provide you with a solid foundation to build on and help to reduce the chance of something going wrong later on.

BUDGET

Unfortunately, even the most basic communications approach comes with costs attached. In a corporate communications plan, the budget section details these.

Catharine Montgomery rightly [points out](#) that you should keep your available budget in mind throughout your planning process and propose activities accordingly. However, for the purpose of a corporate communications plan, this section focuses on detailing and justifying your proposed expenditure.

LOTS TO CONSIDER

If you're proposing a reactive, low-profile approach to your communications, the budget for your initiative may be very low — limited to the costs of drafting a few written products. However, if you're adopting a high-profile strategy, your costs may be significantly higher.

Consider, for example, a relatively simple announcement I planned in early 2008. Costs included:

- Media event staging

- Lighting, audio, location setup

- On-site video & audio production and editing

- Car rentals to advance the location and attend the event

- Media materials production and wire costs:
    o News release
    o Two backgrounders
    o Fact sheet
    o Media advisory

- Other communications materials:
    o Matte article
    o Speech for spokesperson
    o Media Q&As

- B-roll video

- Public education campaign.

All of this for an announcement that, albeit high profile, had zero venue rental costs, no significant interactive or new media, no real marketing, no market research and no advertising.

ERR ON THE SIDE OF DETAIL

If you're proposing a rollout with a significant cost (especially if you're proposing to include advertising as part of the mix), try to make a solid case for that expenditure. You'll find it much easier to get your proposal approved if you provide a detailed breakdown of the costs and make a case for them.

Sometimes you may want to offer multiple options for approaches in your plan. For example, you may want to put forward low, medium and high-profile rollout options along with a recommendation. If so, make sure you offer cost estimates for each option.

Where will these funds come from? Will it fit within your pre-determined communications budget or will extra funding be necessary? If so, what approvals are needed?

EVALUATION

This is it — the last stage of preparing your communications plan — evaluation.

As with several parts of this process, the stage at which you write this part of your plan is fairly arbitrary.

I recommend you turn your mind to it after, not before, you finish considering your analysis and objectives (you do need to know what you're measuring, after all), but beyond that point it's largely up to you.

Evaluation is a tough area to tackle, and one that's often neglected in public relations.

There are plenty reasons for this:

- The challenge of trying to find a measurement system that accounts for the wide variety of tactics possible in a public relations campaign

- The reluctance of clients, be they internal or external, to dedicate budget to evaluation

- The lack of well-established criteria for measuring social media success

- The fast-moving pace of communications that moves us on to the next announcement as soon as the last one is finished.

YOUR GOAL

Your goal in your evaluation section is to lay out how you will measure your communications success.

In a high-profile initiative this may be through the various stages of your announcement (we identified three — pre-announcement, announcement and post-announcement — when we looked at tactics earlier); in others, it may have a smaller scope.

STAGED MEASUREMENT

If you're planning a staged rollout of your communications program, try to measure your results over time. Alongside providing more credible results, this has the added benefit of allowing you to take corrective action if you sense your activities aren't getting the desired results.

Take a look at the different milestones you've identified for the project and consider which ones are suitable points at which to measure.

If possible, try to set a benchmark to measure against. Whether it's sales, awareness, volume of correspondence, attitudes or some other measure, you can make a much more compelling case that you've been successful if you can show a before/after comparison. That means, of course, that you should also measure at the end of the initiative to see whether you've accomplished your

objectives. Ideally, you'll be able to refer to the results showing whether the business objectives were accomplished too.

POTENTIAL METRICS

I'm certainly not an expert in measurement tactics but here are a few metrics to consider, depending on your objectives:

Media coverage

- How much coverage did you receive?

- What was the tone of that coverage (positive/negative)?

- Which media outlets was the coverage in? Where in those outlets? What's the audience of those placements?

- Did you achieve the desired visuals?

- Did they pick up your key messages?

- Were your spokespeople quoted?

- Were the mentions of your initiative the focus of the coverage, or a side note?

- Methods for achieving these metrics vary. While I haven't used it personally, the Media Relations Rating Points system has achieved some traction (see Ben Boudreau's One Degree post for a case study).

Interactive

- How many visitors saw your content?

- How long did they spend on the site?

- What pages did they visit?

- Did they hit specific landing pages?

- What was their bounce rate?

- What was their conversion rate (identify a goal for visitors – purchase/registration/download, etc.)?

- Social media measurement is even more debatable than regular PR. Comments, inbound links, etc are lovely, but at best they're just proxies for more meaningful measurements.
    - For a starter, try KD Paine's "un-standard" of measurement. Joseph Thornley is also working on a social media measurement paper after organizing the Social Media Measurement Roundtable in Toronto in early 2008.

Stakeholders

- How did your stakeholders react?

Public inquiries

- How many letters/emails/calls did you receive on this topic? Is that higher or lower than usual?

- What was the tone of the incoming correspondence?

- What did the correspondents say/ask?

Benchmarking

- Conduct market research/polling before and after (perhaps also during) your communications to show improvement in metrics over time, for example in public attitudes

- Focus groups

This isn't a comprehensive list of metrics by any means, but it's a start.

TEMPLATE

You should arrange your plan in an way that will better allow executives to easily understand the initiative.

Based on my experience, I suggest the following structure:

Strategic Communications Plan: [Title of Initiative]

Announcement:

Context/Environmental Scan:

Stakeholder Analysis:

Objectives:

Audience:

Strategy:

Tactics:

Messages:

Issues:

Evaluation:

Budget:

CONCLUSION

There you have it. Twelve logical sections in a strategic communications plan.

Try to work through all twelve of these sections. Set a strong foundation by doing a thorough analysis of the situation's context, along with a look at the external environment and all of the stakeholders affected by the program. This extra work up-front will provide valuable insight when you develop your plan later on.

As you work through your plan, take care to tie the different sections together. If you do it well, your final strategy and tactics will seem obvious to the reader, belying the thought you put into crafting it.

There is no such thing as a "perfect" communications plan. That's part of the challenge of being a communicator. Each plan is different from the next, and much of it can come down to personal style. However, if you carefully think through all of these sections you'll have a well thought-out document that justifies your approach and that you can justify to your organization's executives.

It may not be perfect, but you'll be well on the way to creating a *good* communications plan.

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CONTRIBUTIONS

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IMAGES

I've used the following images in this eBook:

- Overview — page 4 — tomswift46
- Context — page 7 — bookgrl
- Environmental scan — page 8 — kusito
- Objectives —page 12 — neonerd911
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