

Module 4. Create a communication strategy to maximize impact

Imagine this scenario:

Patricia Edsall was excited to be chosen as the new President of Hope for Athletes, a non-profit organization that helped aspiring, but very poor, young people participate in sports. The organization's primary mission was to use sports as a mechanism to help young people learn discipline, responsibility and remain physically active. Hope for Athletes also provided tutoring and some after school programming in addition to the numerous recreational sporting leagues that it operated throughout the year.

The organization had been quite successful in its community and Patricia's wanted to expand the organization's reach by raising more money. The fundraising campaign would enable Hope for Athletes to offer more sporting events, hire more coaches, and greatly expand its after school tutoring programs. As a former professional athlete herself, Patricia knew that participating in sports provided far more life learning than many people often thought and so she was very passionate about the opportunity to lead the fundraising campaign.

The problem, however, was that Patricia and her staff—including the coaches and tutors—had no idea how to conduct a fundraising campaign. Where should she begin? Who were the people she needed to call? What was going to be "the hook" to get people excited to donate? How could she be sure that her campaign was working? Patricia did what athletes do when they face a new challenge: she found a coach, in this case a professional who designed fundraising campaigns. Jarod Klein, the person Patricia contacted, had run several successful campaigns for local non-profits and so Patricia knew he was the right man for the job.

After meeting with Jarod, Patricia became concerned that she couldn't afford Jarod's full range of services and so she would have to do some of the work herself. She decided to let Jarod advise her on the process of creating a fundraising campaign, but she and her staff would execute it and hope for the best. However, with Jarod's help, Patricia knew that she and her staff would be up to the challenge of communicating with thousands of people about Hope for Athletes and the best was yet to come for the organization!

Unit 4.1 The importance of a written communication strategy

Patricia's story above is just one type of challenge that organizations face, but every organization will have similar opportunities to create long-range plans to communicate with the public to achieve its goals. In Patricia's case, the objective might sound like it's raising money; it's not. The objective might also sound like it's increasing the number of programs; it's not. The true purpose of the communication campaign is to provide opportunities to poor, young people. All organizations have a core purpose and communication plans help to achieve those purposes, if they are done well. However, most organizations fail to plan effectively and so the purpose of this module is to help you become familiar with writing communication strategies to ensure that your organization succeeds in meeting its core purpose.

4.1.1 Defining a communication strategy

We learned in Module 1 about the components of a communication event: audience, purpose, and constraints. Those principles should guide how we operate in every communication event, whether it's an informal email or a complex communication strategy. In fact, a communication strategy is essentially a plan that records all of the decisions necessary to achieve a particular objective and how effective communication will accomplish that goal. Therefore, we can define a communication strategy this way:

A communication strategy is a written plan that records decisions about how we will achieve and measure an organization's goals through effective communication.

In practice, of course, effective communication strategies, especially for complex challenges like Patricia's fundraising campaign, require a great deal of planning and effort to create especially in our modern, global world.

4.1.2 Exploring why a communication strategy is important

Hopefully by this point in the course, the importance of thinking deeply about how your organization communicates will be obvious. In many ways, sports organizations are "communication organizations" because what they do is "generate content" in the form of events and activities that audiences consume. Even though we have examined many concepts that will help you and your organization become more effective communicators, many of the themes are worth repeating to explain why creating written communication plans is so crucial for success.

First, as we learned in Module 3, there are more media and more channels within those media than ever before. In short, whether we are promoting our organizations as Patricia hopes to do or conducting normal operations, we communicate in multiple media. We send email; we talk to people in meetings; we create television commercials; we write letters; we produce videos for YouTube; we Tweet and we post on Facebook. And that's just a small sample of the ways that we communicate daily. When we conduct promotional programs or we want to accomplish specific goals, we have to be even more aware of the media and channel choices because they might determine whether or not the project succeeds or fails.

Second, we have to think about "media neutral content" due to the number of media available. As we create content for external communications, we have to assume that it will also appear in other media and channels. For example, many television commercials become popular on YouTube and often a phrase spoken by a famous athlete or coach might become taglines for an organization. Content bleeds across media and we need to write strategies to plan for how that content will cross between channels and still remain effective.

Third, we need to write good strategies because our audiences are more powerful now than ever. We have to carefully think about our audiences and what will be meaningful to them. Audiences now "pull" information as we learned in Modules 2 and 3 and so we have to enable them to receive our content when they want it, how they want it, and where they want it. In the past, organizations could use television, radio, or direct mail to "push" messages to audience; however, we now must think carefully about audiences in ways we never have before. If we don't carefully consider the audience, then our plans are doomed. A written communication strategy ensures that we've considered as many things as possible about our audiences.

Last, in lean economic times, budgets for communication are shrinking and so we have to be very efficient. In the past, communication was generally assumed to cost money and not generate revenue. We've come to realize, however, that effective communication can be a source of revenue because it helps our organizations stand apart from all the possible distractions audiences might have. Therefore, communication activities and the units within organizations that create communication are now subject to the same close scrutiny as production in a factory. We need to create effective and efficient communication strategies so that we can prove to our managers or owners that we have contributed to the bottom line. Communication is no longer viewed as an "add on service" because it has become essential. With status as an essential part of an organization comes the requirement to justify expenses and correlate those to outcomes. Written communication plans help us predict activities and expenses but also help us demonstrate the outcomes we've achieved.

So why is a written communication strategy important? Because it's a guide that helps us navigate the complex media world we live in and helps us work as efficiently as possible. Without this type of a written strategy to guide our work, we might simply do what "feels right" without understanding how it contributes to the organization, meets audience needs or adds value to the company. Finally, when a plan is written, it creates accountability and transparency and enables organizations to build a history of what works and what doesn't. That knowledge is very valuable and it's only available when we know for sure—when we can see in writing—what we have done in the past (Pedersen Miloch and Laucella 2007).

4.1.3 Explaining the parts of a communication strategy

Although entire books have been written on writing an effective communication strategy, certain common principles occur in nearly all of these books. Additionally, you should recognize some common themes from our prior modules in the parts of a communication strategy outlined below.

Objective

Recall that in our opening story, Patricia wanted to raise money. However, that wasn't the main objective; that is a "tactic" or activity that helps to achieve the goal. Similarly, increasing the number of programs wasn't the core objective; it was also a tactic, just one at a more abstract level. A good objective is therefore something deep, something that articulates the real essence of what you or your organization is trying to accomplish. In Patricia's case, the objective is to provide opportunities to young people.

It's extremely important to have a good objective that aligns with people's values. Most people really wouldn't care that Patricia wants to raise money. They might care a little more that she wants to increase programming. But lots of people would agree with her desire to provide opportunity. When we attach our communication objectives to values like this, we can tell stories that make our objectives come to life. Ideally, every organization has a core objective and the communication strategy begins with that core objective.

However, if your organization don't have such a core objective, articulating one can be easier than you think. Try to think about some of the core needs that most people have: to be loved, to be valued, to be a part of something meaningful, to feel safe, and to have some sense of autonomy or empowerment. How does your organization accomplish one of these goals and for whom? As you think about stating your objective, it should be expressed in the form that first articulates the core objective—what it helps people do—followed by how. For example, Hope for Athletes might write their objective this way:

“Hope for Athletes ensures a bright future for our young people by using sports to teach them tools for success.” This objective then serves as the core idea of the communication strategy because the team will know WHY they are doing what they are doing. This core objective also enables the team to craft content that speaks to that objective.

Budget

Of course we can only operate within the budget that we are given. In Patricia’s case, her budget did not allow for her to hire Jarod, the professional consultant. Instead, she had to manage many of the tasks internally.

In addition to people, budgets also constrain the types of activities we can do. For example, Coca-Cola’s multi-million dollar communication budget enables them to advertise at the largest sporting events and to buy the most expensive television commercials. Smaller organizations clearly cannot do what Coca-Cola can do and the budget becomes the boundary condition for what is possible.

Finally, knowing the budget requires us to be efficient. If we know how much we have to spend and what we hope to accomplish, we can then maximize our choices of media and channels, for example, to have the greatest impact. On Patricia’s case, perhaps she could spend more on local television commercials if she doesn’t hire the consultant, Jarod. Budgets should be viewed as an opportunity to be creative rather than hindrances because if we had all the money in the world, we would not be forced to think carefully about the components of the communication even: audience, purpose, and constraints. Budgets force us to set priorities and priorities create the focus that communication requires to be effective. If communication is for everybody, it’s for nobody. Budgets help us be specific.

Target

The target is just another way of saying “audience.” We examined the concept of audience in Module 1 quite deeply for personal communications, but how does it change for organizational communication when we are trying to communicate with large audiences? Essentially, it doesn’t change but we can put this into the language of business to make it more concrete.

Effective communication strategies include information about two types of audience information. First think about traditional demographics. These are familiar categories such as age, race, gender, income level, or location. This information is available through surveys, buying patterns or even just reflection on your product. Second, think about “new demographics” which segment people based on their activities, beliefs and values. Sometimes these are called “psychographics” to reflect that we are trying to imagine how

people think and generally include beliefs, values, attitudes, hopes, aspirations, skills, passions and interests. For Patricia's communication plan, who is her target? Is it the young people? Probably not. It's individuals who have money to give, are probably mid career, and in her community (traditional demographics). However, those individuals also believe in providing opportunity, value sports in their lives, and are passionate about making the community stronger. With this cross-referenced set of categories, Patricia's team can then begin to craft content that will be effective.

Core Message

Don't confuse "core message" with objective. The core objective is what you're trying to accomplish by communicating. The core message is how you are going to do it. For example, Patricia's team might create content that says, "Help our young people succeed in the game of life." This core message then becomes the core of all the communication activities that occur. Notice that this core message reflects the objective but it expresses it in a way that would be meaningful to their audiences. The core message is therefore specific to the organization but is also general enough that it can be used in different types of media and channels to guide different content targeted toward different audiences.

Media and Channel Choices

Once the team knows their core message, their target audiences, the budget and is clear what the organization is trying to accomplish, the next important decision to record is what media will be used. Given the budget, the organization will obviously be limited in its choices of media (unless the organization is very large or wealthy like many professional sports teams are) and must reflect carefully on where its audience consumes content. Is the audience active on Twitter or is Instagram more important? Does the audience watch television and if so which shows and when? Do they read magazines and newspapers? If so which ones? In order to make the most of the budget, the communication strategy needs to articulate a plan for reaching the largest number of relevant people as possible. Notice that word, "relevant." Simply reaching large numbers of people might be the goal but probably not. Since the strategy has a target audience, it should articulate the plan for reaching them, specifically, especially in our media saturated world.

The channel choices within each media type should also be chosen strategically and they should be integrated (Cornelissen 2014). For example, it's less costly to conduct an ad campaign on Facebook than to create digital videos and place those on YouTube (two channels in the digital medium). It's also more costly to place advertisements in national magazines than in local newspapers (two channels in the print medium). The most important thing is that the channels need to reflect your audience and where they regularly find information. Additionally, since the core message remains the same across

all audience types, even if the presentation is tailored to specific audiences as it should be the communication will be integrated—it will carry the same message just spoken in ways appropriate to that particular channel. In Patricia’s case, for example, she might chose to run large advertisements with photographs in the local newspaper as well as place a smaller ad online with that newspaper. She might also choose to create a short video and link to it through Twitter and Instagram. In each case, she would ask herself “why this medium and why this channel” and that would reflect audience awareness.

Evaluation and Revision

Many communication strategies fail to include a plan for evaluating success and then revising the strategy based upon the assessment of success. Knowing what your team will evaluate and expressing it in terms that can actually be measured can sometimes be a challenge for communication plans because we often measure activities rather than outcomes. For example, Patricia might set a goal of sending 1000 emails to donors. Hitting that number, however, does not mean that they have actually accomplished their goal of raising money. Instead, Patricia should have an evaluation metric attached to the objective of raising money such as “300 people will donate a total of \$5000.” This metric measures how the communication plan created tangible results.

The communication plan should also be open to revision based upon successes and failures. It should be a living document. For example, if Patricia created a video campaign using Twitter and Facebook and that did not generate results, then her team should be willing to try another communication method after it’s clear that this activity didn’t work. Knowing when to change approaches takes some wisdom because sometimes results come slower than we think. However, once the results and data reveal that a tactic isn’t working, the team needs to re-evaluate and attempt something new.

The parts of a communication plan outlined above are intentionally generic. The point is not necessarily that a core message should sound a certain way or the media choices have to be this or that. Instead, the purpose of listing only these major sections in general form is to require the organization to think carefully about what it is doing and why and to record that logic. Simply asking what, why, how and writing it down will produce far better communication results than acting on instinct. In sports we know that players have to practice with intention to become the best at their sport. It is the same in communication where we need to approach our communication with conscious attention to what we are trying to accomplish in any given moment. The communication strategy is one way to help us be mindful about how we are using communication to accomplish organizational goals (Austin and Pinkleton 2014).

4.1.4 Describing the process for writing a communication strategy

The process of creating communication strategies can be as complicated as the strategy itself without understanding how effective teams are formed. The process outlined below helps teams to construct an effective plan and in the most successful organizations, the process for writing the plan is as important as the plan itself. However, unlike the final, written plan which remains open for revision, the team process stays fundamentally the same. In other words, the process doesn't change even though it might be used to change a plan. Each time a plan or part of a plan needs to change based upon its success, the same team process outlined below occurs (although to a greater or lesser extent depending upon the scope of the change in the plan).

Build your team

Most communication plans are written by a team of people although in many small organizations, an individual might have sole responsibility for writing and implementing a plan. Normally, however, multiple people are involved in different configurations. Sometimes an external agency takes all responsibility for communication under the guidance of the internal employees. Other times, however, an external agency is responsible for parts of a plan and internal employees are responsible for other parts. Finally, it often happens that only internal employees are responsible for a plan.

In all cases, the team must consist of people who are capable in the media that are most important to your audiences and they must include differences of opinion. The team must be large enough to accomplish all of the tasks that you imagine will be necessary but small enough to remain manageable. While books exist on creating effective teams, a few key principles are to ensure that individuals share a common goal, that members know the expectations, and that the team communicates frequently both about the tasks they need to complete but also about themselves because effective teams contain both task information and social information because the combination builds trust.

Hold a kick off meeting

Once a team has been assembled, they should hold a kick-off meeting. This meeting, whether in person or virtual should allow the team members to get to know one another a bit (social information) but also include conversations on the goal of the team, the tasks required and the process they'll use to accomplish the goals. The team should agree on the deliverables and the schedule and then after this, the team should assign responsibility for tasks. Once the team has agreed on tasks, deliverables and deadlines, work begins and different groups begin writing different parts of the plan knowing that their work needs to be communicated to the entire group before it is finalized.

Implement

The written communication strategy contains who is responsible for what activities just as it contains the actual content or ideas for content that will occur. For example, Patricia might be responsible for email donors, but maybe Jarod, the consultant, is responsible for creating video spots. Just as the team members know which part of the plan they are responsible to create, the team members also know which part of the plan they are responsible to implement.

Assess the team

Don't confuse this step with assessing the success of the plan. This step assesses the success of the team's process itself and reflects on how well the team worked together and not how well the plan is working. It's very easy to forget to evaluate the team itself during a communication campaign and it's even easier after a project has ended. Compare this to a sports team where a coach constantly evaluates how the team works as a single unit during a game. The coach often moves players around, changes their roles or even introduces new players to help the team succeed. At work, we usually forget to do this type of evaluation but since communication plans are most often implemented by a group of people, evaluating the team is just as important in this context as it is in sports. Just as evaluating the outcomes of the plan itself help us to see where we can make improvements, constantly evaluating the team itself—both during its activity and especially after it has concluded—helps managers to see where the team can improve.

Writing a communication strategy is often overlooked because we think we know who our audiences are and what we want to accomplish. We also think we know when a plan is working or not. It's possible to act on instinct this way and not record the plan in writing and to be successful but the chances of success are far lower than spending the time to think carefully about what we want to accomplish before we begin to act. There is a limit, of course, to planning and writing strategy; at some point we have to actually do the work. However, just as an organization wouldn't start construction on a building without a plan, we shouldn't start communicating with our audiences without a plan, especially in complex or high stakes contexts (Shank & Lyberger 2014).

As you reflect on your own organization's use of communication, both internally and externally, how effective has it been at writing plans? How would your activities and teams changed if your organization had created written communication plans (if it didn't)? How can you use the same concepts in your own interpersonal communication where you create "mini strategies" for nearly all of your communication events at work or in your personal life?

Key Takeaways

- 1) Effective communicators recognize the importance of creating written strategies to plan and record all of the decisions and actions necessary to achieve an organization's goals.
- 2) Written strategies are important because the communication is extremely complex and communication teams are under pressure to demonstrate the value of their activities to the organization.
- 3) A communication strategy has multiple parts including an objective, a budget, a target audience, a core message, media channel choices, and an evaluation and revision plan.
- 4) Writing a communication plan is a complex process that includes these steps: building your team, holding a kick off meeting, iterating, implementing, and assessing the team.

References

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