

Communications Issues

A Community Service of Harley House Consultants Inc.



COMMUNICATIONS STRATEGY PLANNING TEMPLATE

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Making Communicators Better Managers—Making Managers Better Communicators

Introduction

This template has been prepared to assist Government Canada Communication professionals prepare strategic communications plans at the corporate, program and project level. While there is no government wide standard template for communications plans, this proposed template has been developed taking into consideration best practices and headings found in Memorandum to Cabinet (MC) documents. This template has been used by Harley House Consultants Inc. in the preparation of Strategic Communications Plans on behalf of numerous clients. This template is also integrated into the one day Strategic Communications Planning training course offered by Harley House Consultants Inc.

To develop a good Strategic Communications Plan, you need to go through a thorough thinking process. This template has been set up to outline a potential framework and to propose questions to ask yourself and/or others when you are drafting your plan. For each section of the template we have identified a list of potential questions to help guide the development of the plan.

To aid in the timely preparation of a Communications Plan, two additional tools are proposed; a Strategic Communications Planning Logic Model and Communications Action Plans (CAPS). These are outlined on the following pages.

Headings for the Strategic Communications Plan

The following is a proposed table of contents for a Strategic Communications Plan.

- Executive Summary (Optional)
- 1. Background
- 2. Public Environmental Analysis
- 3. Communications Objectives
- 4. Target Audiences and Anticipated Reactions
- 5. Key Messages
- 6. Strategic Communications Considerations
- 7. Horizontal Coordination/Partnerships
- 8. Activities and Vehicles
- 9. Work Plan & Budget
- 10. Evaluation Criteria and Plan

It should be noted, that while the headings are presented in a particular order, a communications strategy is not necessarily prepared in this order. As the strategy is being drafted, think of it as a living-breathing document. Organize the headings as outlined above, and draft and refine sections as you go along. As you add to or amend a section, it may be necessary to go back and refine other sections.

Strategic Communications Logic Model

Typically, when someone is tasked to draft a communications plan, their first reaction is to go to the computer, call up last years plan (or the last plan they drafted) and start updating the information. While this approach may be easiest, it rarely results in the most effective strategy. Strategies start taking on the “same old – same old” look and opportunities for innovation and creativity that can result in more effective strategies are lost.

At Harley House Consultants Inc. we suggest that communicators start off with a clean sheet of paper (white board, flip chart or computer screen) and on one page, draft an overview of your strategy by answering the following four questions:

1. Where am I now? (Public Environmental Analysis)
2. Where do I want to be? (Program and Communications Objectives)
3. How will I get there? (Communications Tools and Tactics)
4. How will I know if I am getting there? (Intended Impacts/Effects and Indicators)

Then answer these questions by organizing your answers in a series of boxes, lines and arrows that illustrate the relationship between the various answers. An example of what we mean is presented on the following page.

In essence, what you are doing by completing this exercise is drafting a blueprint for your strategy. We call this blueprint a Communications Logic Model. The model serves to summarize on a single page an overview of the strategy.

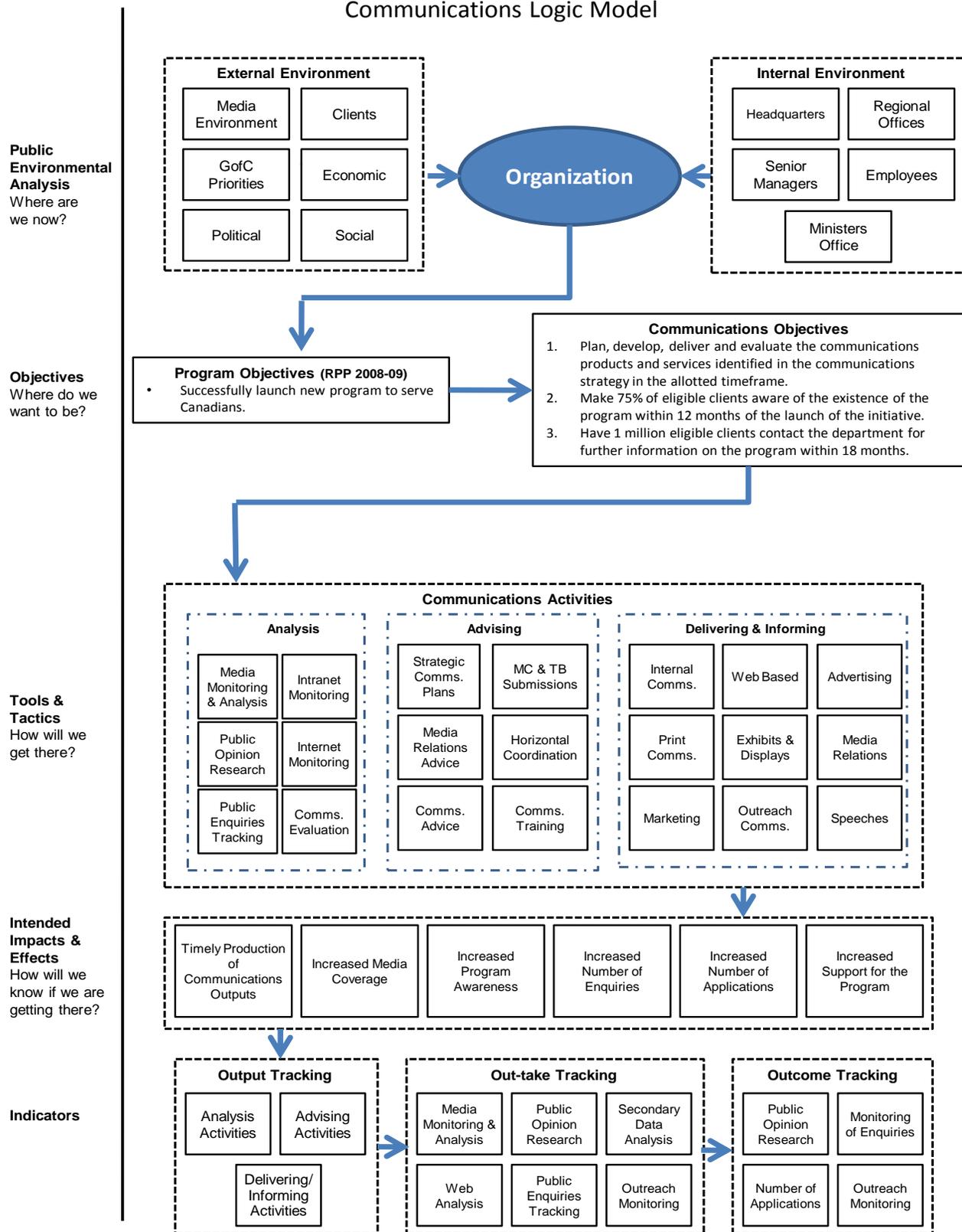
By drafting a Communications Logic Model during the early stages of the strategy development, you are assured that the essence of the program has been captured, and that everyone is in agreement with the direction and emphasis of the strategy. The model also facilitates challenging individual communications objectives and activities by relating them back to the program objectives and intended impacts and effects.

Once the model has been discussed and agreement reached the detailed drafting of the strategy proceeds.

The benefits of making use of such a model:

- Typically reduces the time it takes to prepare a strategy;
- Ensures that the final product is on the mark;
- Helps gain senior management buy-in and support for the strategy since they were involved early on in its development, and can relate to the model of the strategy; and
- Can be used to evaluate and validate new communications ideas as they are developed.

Figure 1
Communications Logic Model



On the previous page was an example of a sample Communications Logic Model. The first draft of this model would be prepared prior to committing any words to paper. The following is a brief explanation of each section of the model.

Where are we now?

This section of the model serves to provide a summary of the environment that the organization is operating in. What conditions (economic, cultural, environmental, political and fiscal) and stakeholders (internal and external) are having an impact on the organization? What opportunities and threats do these conditions and stakeholders present to the organization? It needs to take into consideration both the internal and external environments.

Where do we want to be?

In answering this question, it is important that there be a distinction between the program objectives and the communications objectives. It is critical that the communicator is aware of what the program is trying to accomplish so that you can develop a communications strategy that supports these program objectives. However, the communicator can not be held accountable for achieving the program objectives – there are too many variables that can impact the success or failure of a program that are outside the control of communications. Rather the communicator should be held accountable for the articulation and achievement of communications objectives. In order for this to be accomplished, the communications objectives must be SMART (See page 8 for an explanation of SMART objectives). It is critical that these communications objectives be drafted taking into consideration the environmental factors impacting the organization.

How will we get there?

Once the communicator has identified what they want to accomplish, they must outline how they propose to go about accomplishing this. In this section of the model, the communicator outlines the tools and tactics they propose to employ. These can be organized in terms of proactive and reactive approaches, internal and external, information in and information out, or organized by category/type of tool. Once again, these tools should take into consideration what the organization is hoping to accomplish, and the environment that they are trying to accomplish it in. The more difficult the environment, and the more ambitious the objectives, the more substantial the communications program must be.

How will we know if we are getting there?

Measuring if your intended impacts and effects are achieved involves assessing if your objectives were met. What are the indicators of success in terms of:

- Doing what you set out to do;
- Achieving a certain level of awareness;
- Increasing understanding or support; or
- Changing behaviour.

What indicators do you need to track to measure the progress towards the achievement of your objectives?

Executive Summary (Optional)

A Corporate or Program Communications Strategy should always start with an introduction or executive summary. Most communications plans are targeted to senior managers who do not always take all the time needed to read the whole document in detail. Therefore a well-crafted introduction or executive summary containing all the key decision making elements is essential. It should summarize the current situation, the key objectives and strategies, budget figures and timelines. The executive summary should be as short as possible (around one page).

1. Background

The background should provide the reader with an understanding of what they are reading, and why they are reading it. It should capture any historic information that will assist the reader in understanding the issues completely, and why a communications strategy is necessary.

If this is an annual strategy that background should include a summary of previous year's communications efforts, and what if anything is unique or different this year.

Included in the background should be the corporate, program or project objectives that the strategy is in support of. It is normally only a couple of paragraphs to a page in length.

BACKGROUND CRITERIA	YES	NO
1. Does the background define the issue, the program, the problem or the event?	<input type="checkbox"/>	<input type="checkbox"/>
2. Does the background articulate what and why it should be accomplished?	<input type="checkbox"/>	<input type="checkbox"/>
3. Does the background identify the corporate, program or project objectives	<input type="checkbox"/>	<input type="checkbox"/>
4. Does the background describe the desired communications outcome?	<input type="checkbox"/>	<input type="checkbox"/>

2. Public Environmental Analysis

It is important to be selective here. It is not important to put in everything you know. It is important that your reader understands the environment fully when he/she has finished reading the section.

A comprehensive Public Environment Analysis (PEA) can eliminate "unpleasant surprises". A good public environmental analysis tells the reader a story of what is happening in the external and internal environments. It explains to the reader what is happening, why this is important, and what it means to the organization in terms of opportunities and/or threats.

The PEA summarizes key research and data in order to present an understanding of the project, issue, program etc. The PEA examines the elements of demographics, stakeholder group identification and perception, media analysis including opinion pieces, results of focus groups or surveys, internal program/corporate data and statistics, speeches etc. The PEA will summarize the current level of understanding of the issue and could also trigger the need to recommend further research later on for certain or all elements in the plan.

The PEA should summarize the context that the strategy will try to act upon. The key goal is to have a clear and concise assessment of all the key elements involved in the situation being acted upon. This could include:

- Who are the key external and internal stakeholders involved in this issue, project, program, and what are their respective positions, stances or roles in this program?
- Who will benefit from positive results derived from the project and a successful communication on it?
- How will they benefit?
- What are the key difficulties and hurdles that could impair success?

If the analysis is long and complex, a summary can help to clarify the points you are trying to make. Do not present the results of various lines of enquiry (media analysis, POR, stakeholder tracking, public enquiries tracking, etc), but roll all of the results together under issue headings and interpret for the reader what the collective research means. Individual PEA reports can be appended to the overall strategy.

PUBLIC ENVIRONMENTAL ANALYSIS CRITERIA	YES	NO
1. Is a sufficient body of research available to permit an adequate analysis of all external and internal stakeholders (taxpayers, clients, special interest groups, media, partners, employees, service providers)?	<input type="checkbox"/>	<input type="checkbox"/>
2. Is the available research data current enough to permit an accurate analysis of the communications environment?	<input type="checkbox"/>	<input type="checkbox"/>
3. Is the available research data reliable in terms of data collection methods used (e.g. if published, would the data withstand public scrutiny)?	<input type="checkbox"/>	<input type="checkbox"/>
4. Will the available research data permit an adequate examination of stakeholder awareness, attitudes, interests, and opinions, in relation to major issues?	<input type="checkbox"/>	<input type="checkbox"/>
5. Can Canadians' values be reliably determined from the available data?	<input type="checkbox"/>	<input type="checkbox"/>
6. Will the environmental analysis produced from the available data contribute a sufficient level of information to carry out strategic communications planning?	<input type="checkbox"/>	<input type="checkbox"/>
7. Are sufficient resources being allocated to permit the collection of reliable data to carry out the environmental analysis?	<input type="checkbox"/>	<input type="checkbox"/>
8. Does current research exist within a central agency, another department or agency that could be used to meet the environmental analysis needs?	<input type="checkbox"/>	<input type="checkbox"/>
9. Is new primary research required to meet the environmental analysis needs?	<input type="checkbox"/>	<input type="checkbox"/>
10. Could this new primary research be shared with another department or agency?	<input type="checkbox"/>	<input type="checkbox"/>
11. Is there sufficient time to carry out the research?	<input type="checkbox"/>	<input type="checkbox"/>
12. Is the Public Environmental Analysis report prepared in a fashion that is useful and easy to interpret?	<input type="checkbox"/>	<input type="checkbox"/>

3. Communications Objectives

Formulating communications objectives is the most important part of the communications strategy. If you can't define where you want to be, you will never get there. Begin with the end in mind - clearly state what you hope to achieve with your Strategic Communications Plan when it is implemented.

As was noted earlier, it is important that there be a distinction between the program objectives and the communications objectives. It is critical that you are aware of what the program is trying to accomplish so that you can develop a communications strategy that supports these program objectives. However, you can not be held accountable for achieving the program objective – there are too many variables that can impact the success or failure of a program that are outside the control of communications. Rather you should be held accountable for the articulation and achievement of communications objectives.

The **Communications Objectives** outlined in the Communications Logic Model (See Figure 1) are organized to reflect three potential levels of objectives.

- **Output Objectives** defines the quality and quantity of communications activities developed and delivered. The output objectives are the easiest level of objectives to define and measure. The achievement of these objectives is typically tracked through secondary data analysis, and assigning project numbers to track the number and nature of communications projects and services provided.
 - *Plan, develop, deliver and evaluate the communications products and services identified in the communications strategy in the allotted timeframe.*
- **Out-take Objectives** defines to what extent target audiences are aware of core themes and messages, and have retained and understood them. The primary tools used to track the achievement of out-take objectives is quantitative and qualitative public opinion research. Additional tools could include public enquiries tracking, recording the number of visitors attending an event or speech, and tracking the number of visits to websites in order to assess audience exposure to communications themes and messages as a proxy for awareness.
 - *Make 75% of eligible clients aware of the existence of the program within 12 months of the launch of the initiative.*
- **Outcome Objectives** defines to what extent the target audiences change their behaviour or support. Outcome objectives are the hardest to track because they are typically more long term, and may be influenced by many variables outside the control of communications. Social marketing campaigns such as Health Canada programs to reduce tobacco and alcohol consumption are examples of programs with outcome objectives. However, behaviour is not just influenced by communications but also by environmental, social and economic conditions. Techniques include focus groups and interviews with members of target audiences, research with media representatives and other opinion leaders and observation of people's behaviour. Benchmark research is a pre-requisite to determine baseline behaviour amongst stakeholder groups.
 - *Have 1 million eligible clients contact* the department for further information on the program within 18 months. * Includes enquiries and applications*



Regardless of the objectives selected, it is important that they be SMART Communications Objectives that are linked to the communications objectives and priorities of the organization and the Government of Canada:

Specific - Audience, messages, desired response, timetable

It is often useful to think about the objectives and their relationship to your target audiences – right from the beginning. What does this strategy have to accomplish? Am I trying to inform, educate, change values, change behaviours, get immediate action, or get someone to do something? By when do I want to accomplish my objectives? Be as concrete as possible.

Measurable - Awareness, understanding, support

Objectives must be measurable so that you can demonstrate communications results. Use benchmark data if possible and state objectives in terms of... “Increase awareness from x% to y%.” If benchmark data does not exist, state the objective in terms of... “Generate x number of media enquires”, or “Achieve an understanding level of y%.”

Achievable - Possible given the public environment, timing, and available resources

It is important to ensure that your objectives are doable given the current situation. Also ensure that achievements are attributable to the communications strategy. You do not want to be accountable for achieving objectives that are outside your control. If not achievable, identify what additional activities could be carried out if specific additional resources were available.

Relevant - To the organization’s mandate

Can I sell these objectives to my clients – program, policy, my boss, others? Do they support the objectives outlined in the organization’s departmental strategic planning framework? Do my objectives fit with the Government’s overall agenda/messaging as outlined in the Speech from the Throne and budget?

Timely - Can be achieved in time to contribute to the overall objectives

How long do I have to achieve the results? 1 month? Three years? If the strategy is intended to support legislation before parliament, is the strategy designed to achieve its objectives before the legislation is scheduled to be passed?

When drafting a SMART objective it is recommended that you follow the following steps.

1. Review and clarify the departmental, program or project objective(s).
2. Establish the timeframe that the objective(s) needs to be achieved in.
3. Determine at what level(s) of measurement you want to have your objective(s) defined in (Output, Out-take or Outcome).
4. Quickly write out an initial draft of the communications objective(s).
5. Edit the draft objective(s) by reviewing the SMART criteria.
6. Review the communications objective(s) with your team, boss and client.
7. Finalize the communication objective(s).

Please note that it is possible, and sometimes advisable, to have more than one communications objective.



COMMUNICATIONS OBJECTIVES CRITERIA	YES	NO
1. Was the client/program consulted with prior to defining the communications objective in order to clarify the department, program or project objective?	<input type="checkbox"/>	<input type="checkbox"/>
2. Have <u>S</u> pecific communications goals and objectives been defined? (e.g. audiences, messages, desired response, timetable)	<input type="checkbox"/>	<input type="checkbox"/>
3. Have these goals and objectives been defined in <u>M</u> easurable terms? (e.g. awareness, understanding, support, action)	<input type="checkbox"/>	<input type="checkbox"/>
4. Are these goals and objectives <u>A</u> chievable given the public environment, timing and available resources?	<input type="checkbox"/>	<input type="checkbox"/>
5. Are these communications goals and objectives <u>R</u> elevant to the Government of Canada?	<input type="checkbox"/>	<input type="checkbox"/>
6. Can these communications goals and objectives be achieved in a <u>T</u> imely fashion so as to contribute the overall objectives of the Government of Canada, organization and/or program?	<input type="checkbox"/>	<input type="checkbox"/>
7. Has the client reviewed and approved the objective?	<input type="checkbox"/>	<input type="checkbox"/>

4. Target Audiences and Anticipated Reactions

Choose the most significant audiences and then identify which parts of the initiative they are likely to accept, and which aspects they are likely to oppose.

The communications strategy must clearly define whom you aim to inform, influence, and consult. Defining the target audience broadly, such as the general public, should be avoided as much as possible. Strategies and tactics can greatly vary depending on a precise determination of who the priority target audiences are. Target audiences can also vary throughout the life of the strategy.

The more precise and detailed the better because it will increase mutual accountability (the client's and yours), enable focus on particular strategies and tools, and greatly enhance efficiency measurement after the project.

Categorizing target audiences as primary and secondary is also useful, when possible. This will enable budget prioritization. If there is not enough money to reach all the targets, concentrate on reaching the ones identified as primary groups.

TARGET AUDIENCE CRITERIA	YES	NO
1. Do I know whom I have to reach?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do I know what their positions are?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do I know what messages they need to hear?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do I know how to reach them?	<input type="checkbox"/>	<input type="checkbox"/>
5. Are there clusters of audiences for whom the same messages apply?	<input type="checkbox"/>	<input type="checkbox"/>
6. Am I being consistent?	<input type="checkbox"/>	<input type="checkbox"/>
7. Have I reviewed against the public environment analysis?	<input type="checkbox"/>	<input type="checkbox"/>

8. Are some audiences more important than others?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do different audiences become important at different stages in the strategy?	<input type="checkbox"/>	<input type="checkbox"/>
10. Will some audiences have more influence on the outcome of my strategy than others?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do I know how each of my audiences may react?	<input type="checkbox"/>	<input type="checkbox"/>
12. Have I dealt with this in the plan?	<input type="checkbox"/>	<input type="checkbox"/>

5. Key Messages

Ensure that you reflect on the target audience, issues, opportunities and strategic considerations as you develop messages. Messages should resonate with key target audiences. What are the two or three key things we want or need to say, or that need to be heard or understood by the target audiences? Think first about what they want to know, and then about what you want them to know. Keep messages clear, simple, concise and positive. It is best to limit messages to 3 or 4 key messages.

Key messages are important in order to ensure that all spokespersons and communications products formulate messages, arguments and ideas in the same way for consistency purposes.

It is sometimes useful to draft a simple matrix (Target audiences across the top of the matrix, and key messages down the left hand side of the matrix). Then in each cell identify which messages are primary (P) and secondary (S), or are not at all relevant (-) for each target audience. If you have a target audience that has no messages, it will be necessary to draft additional messages. If you have too many messages for a particular target audience, you may wish to scale back on the messages.

KEY MESSAGE CRITERIA	YES	NO
1. Will the message be clear, coherent and, understood by all target audiences?	<input type="checkbox"/>	<input type="checkbox"/>
2. Can this message be misunderstood?	<input type="checkbox"/>	<input type="checkbox"/>
3. Is the message written in terms of what the listener wants to know, instead of what you want them to know?	<input type="checkbox"/>	<input type="checkbox"/>
4. Will most people who hear it understand the message the same way?	<input type="checkbox"/>	<input type="checkbox"/>
5. Will this message be offensive to any of my target audiences?	<input type="checkbox"/>	<input type="checkbox"/>
6. Am I using jargon?	<input type="checkbox"/>	<input type="checkbox"/>
7. What level is the language? Higher than Grade 8?	<input type="checkbox"/>	<input type="checkbox"/>
8. Have I reflected the core values of Canadians?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do my messages have a citizen-focus?	<input type="checkbox"/>	<input type="checkbox"/>
10. Have I linked my messages to the overall Government of Canada agenda/messages, Speech from the Throne?	<input type="checkbox"/>	<input type="checkbox"/>
11. Have I made the connections/links that people need to understand what the government is doing, why it is doing it, how it is doing it, and how this will benefit Canada and Canadians?	<input type="checkbox"/>	<input type="checkbox"/>

6. Strategic Communications Considerations

The Strategic Communications Considerations outlines how you are going to approach the communication problem. Strategies inform the reader about the approach, treatment, style, rhythm, and scale of the plan and not the specific tools or activities, which are the tactics of a communications strategy. This is the part of the strategy where you synthesize all of the information, data, hunches, insights that you have had throughout the developmental work.

This section identifies those things that will directly influence communications negatively (weaknesses or threats) or positively (strengths or opportunities). This information should be reflected in the Public Environmental Analysis section of the strategy. Try to present this information clearly and precisely. In particular, highlight Federal/Provincial/Territorial sensitivities and indicate how they will be addressed. Indicate roles, if any, for regional Ministers, MPs and partners if applicable.

The Strategic Communications Considerations will outline the rhythm of the communications strategy and the rationale. For example:

- Is the strategy to be launched nationally, or in one region and then rolled out across the country?
- Will there be a big splash right at the beginning and simple maintenance for the next three months, or a very slow start and a climax at the end of the strategy or should there be a continuing/ongoing series of awareness moments in order to create ongoing awareness?
- Will the strategy be very noisy and high profile or low key?
- Do you want to communicate proactively with a series of target groups or would it be better to wait for solicitation and just be reactive? Or a combination of the two?
- Do you want to use the same approach for all target groups? If not, why and what are the different approaches you recommend for a particular group?
- Will there be only governmental spokespersons in this project or will you strive to ignite third party endorsements and support?
- Who will be taking the lead and why?

For every strategic consideration raised, you have to come up with a communications solution or strategy to solve it. (If it is beyond your control to resolve – e.g. due to limited resources – note what would have to happen to solve it.) The solution could be an activity, a message, a product, an event, advertising, further research etc. You should also try to establish the responsibility for what you are proposing: e.g., is it a communications responsibility? Is it a program or policy responsibility? Does the frontline do it?

STRATEGIC COMMUNICATIONS CONSIDERATIONS CRITERIA	YES	NO
1. Are there any federal/provincial/territorial considerations that need to be addressed?	<input type="checkbox"/>	<input type="checkbox"/>
2. Are there any regional or local considerations that need to be addressed?	<input type="checkbox"/>	<input type="checkbox"/>
3. Have the opportunities or constraints that will affect communications for this initiative been identified?	<input type="checkbox"/>	<input type="checkbox"/>
4. Are my solutions workable? If not, can I suggest anything to improve the odds of success?	<input type="checkbox"/>	<input type="checkbox"/>

5. Do I have sufficient detail for my audience to understand what the challenge or opportunity is and why it is important to the outcome of the communications strategy?	<input type="checkbox"/>	<input type="checkbox"/>
6. Have I identified what external factors will influence how this initiative is received?	<input type="checkbox"/>	<input type="checkbox"/>
7. Do we know how best to handle those factors - proactive versus reactive, low versus high profile, regional versus national?	<input type="checkbox"/>	<input type="checkbox"/>
8. Is there a need for pre-positioning?	<input type="checkbox"/>	<input type="checkbox"/>
9. Can I get others to support the Government's position?	<input type="checkbox"/>	<input type="checkbox"/>
10. Is there any media hostility, public indifference, issue complexity that will make it difficult to explain?	<input type="checkbox"/>	<input type="checkbox"/>
11. Are there any competing national, regional, sectoral, or international interests?	<input type="checkbox"/>	<input type="checkbox"/>

7. Horizontal Coordination/Partnerships

Many of the files that the Government of Canada deals with today are horizontal files. This could include a file that involves a number of federal government departments and agencies (e.g. Climate change, safety and security), or a file that involves multiple levels of government (e.g. Infrastructure or homelessness). Horizontal communications recognizes that many communications activities involve interests and responsibilities that cross organizational lines and require coordination and cooperation. The communications strategy should be based on horizontal coordination.

Joint communications activities or initiatives involving other government departments, other levels of government, a company, an organization, a group or an individual may be possible when the parties have shared or compatible objectives. Agreements governing collaborative arrangements establish the communication roles and responsibilities of the parties involved.

HORIZONTAL COORDINATION/PARTNERSHIP CRITERIA	YES	NO
1. Has a list of all communications activities planned been compiled?	<input type="checkbox"/>	<input type="checkbox"/>
2. Are activities strongly linked to other departments or agencies?	<input type="checkbox"/>	<input type="checkbox"/>
3. Have all opportunities for horizontal coordination been explored?	<input type="checkbox"/>	<input type="checkbox"/>
4. Are the communications roles clear for: Individual departments and agencies? For the Minister? Other Ministers? NGO's? Interest groups? Public at large?	<input type="checkbox"/>	<input type="checkbox"/>
5. Have official languages, corporate identity, visibility, publishing, marketing and promotional activities been delineated in the partnering agreement?	<input type="checkbox"/>	<input type="checkbox"/>
6. Has the "Canada" wordmark been used in identifying the Government of Canada participation?	<input type="checkbox"/>	<input type="checkbox"/>
7. Have partners acknowledged the Government of Canada's contribution in their own communications with the public?	<input type="checkbox"/>	<input type="checkbox"/>
8. Is such a partnership mindful of public perceptions, avoids conflicts of interest, uphold public trust and confidence in the impartiality and integrity of the Public Service, and honour the value and reputation of public institutions?	<input type="checkbox"/>	<input type="checkbox"/>

8. Activities and Vehicles

In this section you have to clearly state what it is you are recommending should be done to address the communications objectives. Remember to include those ideas that surfaced when you were working on the Strategic Communications Considerations and Horizontal/Partnerships.

This section builds on the listing of communications tools and tactics that were identified in the Logic Model (See Figure 1) and is expanded on to provide a description of the methodology you intend to use to achieve your communications objectives.

This section describes in detail, all the activities and vehicles recommended for each communications discipline. If, for example, the strategy recommended heavy reliance on media relations, here is the place to provide the supporting details: press releases, press conferences, or media briefings or a combination of elements.

Each tactic should be presented and explained in detail (what, when, how, who and why) including the tools needed to accompany the recommended activity. Communications tools and tactics can vary greatly depending on the organization. Among them are:

Media relations

- ◆ Press conference
- ◆ Press briefing
- ◆ Media release
- ◆ Editorial Board
- ◆ One-on-one interviews
- ◆ Reactive media relations

Advertising

- ◆ Media type determination
- ◆ Creative
- ◆ Media planning and buying
- ◆ Strategy
- ◆ Production
- ◆ Rollout

Marketing

- ◆ Creative (message and production)
- ◆ List planning and determination
- ◆ Required collateral (brochure, etc.)
- ◆ Dissemination scenario and calendar

Public Outreach

- ◆ Speech delivery
- ◆ Public meetings, consultations
- ◆ One-on-one meetings
- ◆ Government relations

Internal Communications

- ◆ Internal Newsletters
- ◆ Town halls
- ◆ Lunch and learns

Research

- ◆ Focus groups/ Individual interviews
- ◆ Quantitative research, surveys
- ◆ Media monitoring and analysis

Electronic Communications

- ◆ Web communications
- ◆ Intranet
- ◆ E-mails
- ◆ Blogs

Materials production & dissemination

- ◆ Print communications
- ◆ Internal newsletters, memos
- ◆ Exhibits and displays
- ◆ Public/Ministerial enquiries



As in the case with Key Messages, it is sometimes useful to draft a simple matrix (Target audiences across the top of the matrix, and tools and tactics down the left hand side of the matrix). Then in each cell identify which tools and tactics are primary (P) and secondary (S), or are not at all relevant (-) for each target audience. If you have a target audience that has no tools and tactics, it will be necessary to consider additional activities & vehicles. If you have too many tools and tactics for a particular target audience, you may wish to scale back on the activities & vehicles.

ACTIVITIES AND VEHICLES CRITERIA	YES	NO
1. Do we know what we need to do to move people from point A to point B?	<input type="checkbox"/>	<input type="checkbox"/>
2. Will this take a lot of communications effort? A lot of money? A lot of human resources?	<input type="checkbox"/>	<input type="checkbox"/>
3. Have the spokespersons been identified?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do we know what types of information to give the spokespersons?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do we know what the strategy has to accomplish? Am I trying to inform? educate? change values? change behaviours? get immediate action - get someone to do something?	<input type="checkbox"/>	<input type="checkbox"/>
6. Have I made the right choices/tradeoffs?	<input type="checkbox"/>	<input type="checkbox"/>
7. Does any of this thinking change my strategic considerations?	<input type="checkbox"/>	<input type="checkbox"/>
8. Have I uncovered any time bombs that I have to deal with in my strategic considerations now?	<input type="checkbox"/>	<input type="checkbox"/>
9. Timing – do we know what has to be done when?	<input type="checkbox"/>	<input type="checkbox"/>
10. Does the ordering of messages affect my outcome?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do we know what profile the government wants for this activity?	<input type="checkbox"/>	<input type="checkbox"/>
12. Does this compliment the agenda/priorities or detract from them?	<input type="checkbox"/>	<input type="checkbox"/>
13. Are there any “horizontal” implications/opportunities?	<input type="checkbox"/>	<input type="checkbox"/>
14. Have all departments been engaged?	<input type="checkbox"/>	<input type="checkbox"/>
15. Have the needs of Canadian’s involved been considered/addressed?	<input type="checkbox"/>	<input type="checkbox"/>
16. Am I using the most cost-effective and efficient tools available to me?	<input type="checkbox"/>	<input type="checkbox"/>
17. Have I produced a strategy or a communications smorgasbord?	<input type="checkbox"/>	<input type="checkbox"/>
18. How visible are these tools/activities/events going to make this initiative?	<input type="checkbox"/>	<input type="checkbox"/>
19. Have I been strategic in my choice of tools/activities/events?	<input type="checkbox"/>	<input type="checkbox"/>
20. Have I chosen the best vehicle to reach each target audience?	<input type="checkbox"/>	<input type="checkbox"/>
21. Do I have sufficient resources to achieve what I have described?	<input type="checkbox"/>	<input type="checkbox"/>
22. Do I have sufficient time to pull this strategy off?	<input type="checkbox"/>	<input type="checkbox"/>
23. Do I have sufficient allies in the organization to get these ideas into play?	<input type="checkbox"/>	<input type="checkbox"/>

9. Work Plan and Budget

Before a client can approve a communications strategy, they must have a clear understanding of what will be done, when, by whom and at what cost. This enables the reader/client to understand how the strategy will roll out, and how much time each phase will take. It provides an at-a-glance view of the strategy so that it is easier for the client to determine if the strategy should be scaled down if necessary for time purposes or to ask for added resources in order to speed up some elements of the process. This can be presented in a simple chart or table form, so that on one page the reader gets an overview of the time and budget for the strategy. If more than one option is presented to the client, each option should be cost out.

When costing out the strategy, take into consideration all internal costs, including person days or hours of effort (by Communications and Program representatives), the cost of external consultants as well as design, production and distribution costs.

For more long term and complex strategies, it is recommended for each major communications activity that a detailed work plan be prepared and appended to the strategy that identifies the specific activities that need to be undertaken as the strategy and its components are planned, developed, delivered and evaluated. To assist in this task, you may wish to make use of Communications Action Plans (CAP's)

Communications Action Plan



Harley House
Consultants Inc.

Activity:					
Objective:					
Step:	Detailed Description	Responsibility	Timeframe	Budget	Status
Planning					
Development					
Delivery					
Evaluation					
Notes:					

Communications Action Plans can also be very useful in documenting Memorandum of Understanding (MOU's) between communications and clients for the provision of communications support. The use of CAP's help ensure that communications activities stay on track.

WORK PLAN AND BUDGET CRITERIA	YES	NO
1. Are all elements of the strategy costed? financial, human, time frames. (Include cost of outside resources and distribution)	<input type="checkbox"/>	<input type="checkbox"/>
2. Have potential sources of funding been pooled to leverage the impact of the Government of Canada communications presence?	<input type="checkbox"/>	<input type="checkbox"/>
3. If the budget is higher than you would like and you have made strategic choices and trade-offs, is there another option for getting additional resources? Partners, supporters, backers etc (internal or external).	<input type="checkbox"/>	<input type="checkbox"/>
4. How long would it take to secure additional funding?	<input type="checkbox"/>	<input type="checkbox"/>
5. Is this a viable option?	<input type="checkbox"/>	<input type="checkbox"/>

10. Evaluation Criteria and Plan

Finally, the communications strategy should include a clear indication of the agreed-upon criteria that will be used to determine if the communication strategy was successful or not. These criteria should be intimately linked to the attainment of the client's objectives and goals, as well as the communication objectives. This section identifies the methods that will be used to determine whether communications goals and objectives have been met. Tools to measure communications effectiveness, user satisfaction and cost effectiveness vary immensely depending on the scope of the strategy, the recommended tactics, and the financial resources committed to the strategy. It is important to include some feedback and efficiency measurement mechanisms in every significant project in order to increase accountability and foster a clearer understanding of the desired outcome between client and communicator.

If you have identified specific results to be achieved then you will need to develop indicators to determine if the identified results are being achieved. Indicators may be qualitative or quantitative and indicate that change is taking place.

The section should include the Intended Impacts and Effects that would demonstrate that the Communications Objectives were achieved (See Figure 1 - Communications Logic Model). Potential Indicators include:

- Output Tracking
- Public Opinion Research
- Media Monitoring & Analysis
- Secondary Data Analysis
- Web Analysis
- Public Enquiries Tracking
- Outreach Monitoring
- Monitoring of Enquiries
- Number of Applications



The idea is to track the strategy as it is planned, developed and delivered over both the short and longer term so as to continuously evaluate the effectiveness of the strategy. As a result of carrying out the evaluation, you should be in the position to answer the following questions:

EVALUATION CRITERIA	YES	NO
Part I – Communications Effectiveness		
1. Was the output/strategy completed on budget and on schedule?	<input type="checkbox"/>	<input type="checkbox"/>
2. Did the output/strategy or plan produce the communications outputs that were intended?	<input type="checkbox"/>	<input type="checkbox"/>
3. Did the messages reach the intended audiences?	<input type="checkbox"/>	<input type="checkbox"/>
4. Did the publics believe the messages?	<input type="checkbox"/>	<input type="checkbox"/>
5. Did the strategy or plan communicate the objectives it was intended to address?	<input type="checkbox"/>	<input type="checkbox"/>
6. Has the impact/effectiveness of the strategy been documented?	<input type="checkbox"/>	<input type="checkbox"/>
7. Were there “lessons learned” that could be applied to future strategies?	<input type="checkbox"/>	<input type="checkbox"/>
8. Were the results of the evaluation made available in time for them to be useful?	<input type="checkbox"/>	<input type="checkbox"/>
9. Was it determined how the strategy could have been improved?	<input type="checkbox"/>	<input type="checkbox"/>
10. Were actionable findings and recommendations produced as a result of carrying out the evaluation?	<input type="checkbox"/>	<input type="checkbox"/>
11. Have the results of the evaluation been added to your public environmental analysis database?	<input type="checkbox"/>	<input type="checkbox"/>
Part II – User Satisfaction		
12. Did the target audience find the output/strategy informative and interesting?	<input type="checkbox"/>	<input type="checkbox"/>
13. Did the strategy achieve the desired audience impact?	<input type="checkbox"/>	<input type="checkbox"/>
14. Did the output/strategy address the requirements of the Government of Canada at the regional and national levels?	<input type="checkbox"/>	<input type="checkbox"/>
Part III – Cost Effectiveness		
15. What is the cost per thousand reach?	\$	
16. Was the output/strategy produced within budget?	<input type="checkbox"/>	<input type="checkbox"/>
17. Did the results of the output/strategy justify the cost?	<input type="checkbox"/>	<input type="checkbox"/>