Communication
Resource Center

Strategic
Communication Planning

A Workbook for
Garrett Lee Smith Memorial Act
State, Tribal, and Campus Grantees

A Life in the Community for Everyone

SAMHSA

Substance Abuse and Mental Health Services Administration

U.S. Department of Health and Human Services

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Welcome!

The Communication Resource Center (CRC) and the Suicide Prevention Resource Center (SPRC) believe that great communication begins with a strong strategic plan, developed for your grant site by your partners and stakeholders. Creating and relying on a well-considered plan provides a strategic roadmap for your communication activities. It can also be a critical component of your program's long-term success.

Why Bother With Communication Planning?

Creating a communication plan presents you and your partners with an opportunity to commit to your ongoing success as a team. Your Garret Lee Smith Memorial Act (GLSMA) grant allows you to make a meaningful investment in your community. As you look toward sustaining your program, you will need to ask others to join you in that effort. A communication plan can help.

Your plan will help uncover ways to deepen existing partnerships and develop new ones that hold the potential to help sustain—or even expand—key functions of your program. Your plan will allow you to make the most of your coalition's limited time and resources. And having a plan in place can help alleviate the stress many grantees feel near the end of Federal funding.

If you've used communication strategies from the start of your grant cycle, it's quite probable you've focused on reaching those audiences you most wanted to engage in your programs and services. To support sustainability, you may find it necessary to communicate your successes to the audiences that can help sustain select functions when grant funding ends. While this may include previous audience groups, it often means adding new and different key audience groups, and it's likely they won't be moved by the same strategies you've used in the past.

Perhaps you and your partners created a communication plan at the start of your grant cycle. If you did, now's the perfect time to revisit that process since you'll be reaching out to new and different audiences to tell your story and generate support for the future.

Or, perhaps you and your partners have been using communication here and there to promote your program—a press release submitted to your local paper announcing your grant award; a brochure that describes your services; a Web site that's updated every once in a while. Perhaps you've felt as though there has never been enough time to craft a larger plan. We understand those constraints. But we believe these occasional communication tactics could have a much greater impact if created within the context of an overall strategy.

We believe it's never too early—and it's never too late—to think strategically about communication. We encourage you to engage in this process; we believe it can be an important tool to help your program leave a lasting footprint in your community.

The 8-Step Communication Planning Model

The CRC utilizes the 8-Step Communication Planning Model* to provide a blueprint for planning, regardless of where you are in your grant cycle. It is not a "one size fits all" tool, but allows users to create site-specific, actionable communication plans. It is based on the theory and practice of social marketing, which adapts commercial marketing techniques to influence people to take recommended action or make positive changes in their lives.

This model will help you:

- Start with a thorough assessment of your current situation (Step 1).
- Set measurable communication goals (Step 2).
- Define your intended—sometimes called "target"—audiences (Step 3).
- Develop and pretest your messages to those intended audiences (Step 4).
- Select the best ways to deliver those messages (Step 5).
- Create an action plan for delivering your messages and materials (Step 6).
- Develop and pretest materials you wish to create (Step 7).
- And finally, implement the plan (Step 8).

Every communication plan is a "living" document, and its ultimate success depends on a willingness to evaluate how implementation is going and make mid-course corrections as needed.

Using This Workbook

This 8-step process works for your grant site *no matter where you are in your grant cycle,* from startup to sustainability.

In addition to this introductory section, this workbook provides guidance and worksheets for completing the first 5 steps of the 8-Step Model. These steps represent the strategic component of your plan. The workbook also provides an understanding of Steps 6, 7, and 8—the steps that put your strategy on its feet.

* Our planning model is based on the National Cancer Institute's *Making Health Communication Programs Work* (the "Pink Book"; 2001) with additional information drawn from Kotler, Roberto, and Lee's Social *Marketing: Improving the Quality of Life.* (2002).

The 8-Step Communication Planning Model
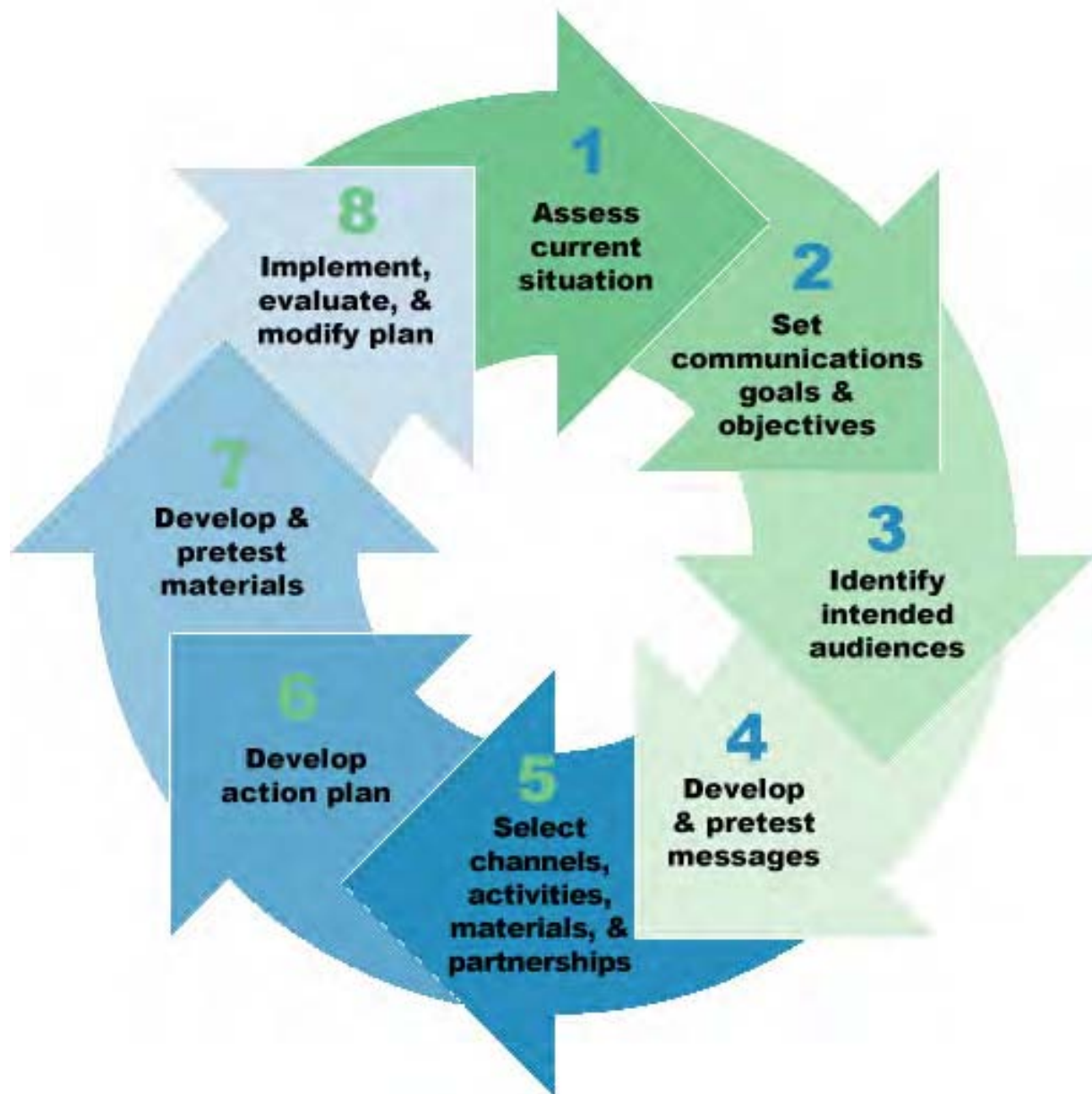
Step 1: Assess Your Current Situation

Purpose: To realistically assess your program by articulating your successes to date and your perceived challenges.

The first step in developing your communication plan is to realistically assess your current situation. Why? Because you can't figure out where to go if you don't know where you are.

First, Ask the Right Questions

Start by asking the right questions—questions that help you and your partners identify the strengths, weaknesses, opportunities, and threats facing your program. The answers will provide you with a strong "reality check," and will include both the hard truths as well as the intangibles surrounding your program.

The following list contains the types of questions you should consider as you work through this first step of the 8-Step Communication Planning Model. Think about how you would answer each question as you continue reading.

- Are you serving the numbers of people you set out to serve?
- Are you effectively serving the variety of cultures in your community?
- Are your partners behind your program? Are they "champions" yet?
- Are you satisfied with your outcome data?
- Have the media covered your program?
- Have you identified the functions you want to sustain?
- Are your partnerships committed to sustaining this program?
- How does money flow in your community? How is your competition funded?
- Who else do you need on board to sustain your program? Do you see your mission aligning with other organizations in your community?

Then, Conduct a SWOT Analysis

A SWOT analysis is an excellent tool for taking stock of where your program is right now. Think about your answers to the questions above. Now, complete the chart below with the strengths, weaknesses, opportunities, and threats surrounding your program. Keep in mind the following:

- **Strengths** are *internal* attributes of your program that can help achieve your objectives.
- **Weaknesses** are *internal* attributes of your program that can hinder your objectives.
- **Opportunities** are *external* conditions that can help achieve your objectives.
- **Threats** are e*xternal* conditions that could hinder the program's performance.

Directions:

- Consider your answers from the previous page and complete this SWOT analysis.

Strengths	Weaknesses
Example: Strong partner support of your program.	Example: Haven't communicated successes to community.
Opportunities	**Threats**
Example: Champions don't want program to go away.	Example: Stiffer competition for shrinking pool of funding.

Step 2: Set Communication Goals and Objectives

Purpose: To articulate your intended accomplishments in ways that can be measured.

Effective communication can be crucial to the success and sustainability of your efforts and to creating lasting systems change. Setting appropriate and measurable strategic communication goals will help you get there.

Your communication goals should:

- Support your programmatic objectives.
- Help sustain your program.
- Promote systems change.

Set communication goals that:

- Seek to engage, raise awareness, and—ultimately—change behavior.
- Persuade others to take action on your behalf.
- Are realistic.
- Can be measured, so you'll know when you've succeeded.

For example:

If your *programmatic goals* include:

1. Ensure program is implemented to fidelity.

2. Implement anti-bullying curriculum in all elementary schools.

3. Have 125 students participate in the peer mediation programs.

Then, your *communication goals* will focus on educating, engaging, and generating buy-in from the various audiences that can help you achieve those goals. For example:

1. Drive program decisions during grant period.

2. Convince teachers to implement anti-bullying curriculum. or

3. Generate interest in peer mediation programs among all undergraduates.

Remember: Communication goals are <u>not</u> tactics!

Too often we make the mistake of thinking that a communication goal is to "create a brochure" or "send out a quarterly newsletter." Great ideas, perhaps; but they're *not* goals. These are tactics that may or may not be developed to support your efforts to educate, engage, and generate buy-in from audiences.

Don't worry—we'll take a good look at ideas—tactics—like these and others in Step 5. For now, take a step back, think strategically, and create those *goals*!

Directions:

- List up to five desired communication goals.
- Prioritize those goals by ranking them 1 to 5 in the far right column.

Communication Goals and Objectives	Prioritize
Goal 1	
Goal 2	
Goal 3	
Goal 4	
Goal 5	

Step 3: Identify Intended Audiences

Purpose: To identify all potential intended—sometimes called "target"—audience segments for each communication goal; to prioritize those audiences and learn as much as possible about them.

Now that you've identified your communication goals and objectives, it's time to identify the specific audiences you need to reach for each separate goal, or, to put it another way, who needs to be at the table.

Bear in mind, the audiences you choose to reach early in your grant cycle may or may not be the audiences you most need to reach later. For example, you may spend your first year or two focused entirely on engaging students, teachers, and parents. You may want to keep students as a key audience for sustainability, but you may want to focus on adding community partners, policymakers, and campus leadership to your communication efforts.

Directions for Worksheet A:

- List the intended audiences you need for each of your communication goals.

List Intended Audiences for Each Goal	
Goal 1	
Goal 2	
Goal 3	
Goal 4	
Goal 5	

Next, Segment Your Intended Audiences

Segmenting your audiences is a critical—and often overlooked—step to creating communication messages and materials that resonate. Let's say you're working with a college campus to reduce suicide risk among students there, and one communication goal is to "generate interest in peer mediation programs among undergraduates."

One intended audience clearly would be undergraduate students themselves but not all undergrads will share the same level of interest in the program. To create the most effective communication strategy, segment your broader intended audience into subgroups based on their needs, values, and/or mission. For example

- Juniors and seniors who have volunteered with suicide prevention hotlines.
- Juniors and seniors majoring in social work and psychology.
- Freshmen and sophomores who live on campus.
- Freshmen and sophomores who commute.

Breaking down your general audience into subgroups helps you craft messages and materials specifically tailored to them.

Then, Prioritize Your Intended Audience Segments

You may now find that instead of talking about communicating to all undergraduates, you're really looking at communicating to four key segments of the student body. This may seem as though your work has increased, but it really hasn't. You can prioritize your intended audience segments and focus your efforts (strategically!) on those groups at the top of the list.

To help in this process, ask yourself which segment is most likely to give the support you need? Who needs to be reached first? Which segment's mission most closely resembles yours?

Finally, What Do You Know About Them?

Once you've identified and prioritized your intended audience segments, learn as much as you can about their mission, their values, their beliefs and their goals. What sources of information do they trust? Are they aware of your program's work, and are they supportive of it? What parts of your goals for sustainability align with their concerns? What's the best way to reach them?

It's impossible to know too much about your intended audiences, and all your findings will assist you in creating messages and materials that are more likely to persuade them to take the desired action.

Directions for Worksheet B:

- Write a priority goal in the top section of this worksheet.
- Use the left column to identify your list of the prioritized audience segments you need to reach for this goal.
- Fill in the right column by listing as much as you know about each segment. Use the questions listed as a point of departure for your thinking.

Goal:	
Intended Audiences *(listed in order of priority for this goal)*	*Consider:* **What does each audience want? What do they value? What sources of information do they trust? Where can they be reached? What are the barriers to reaching them? What kinds of stresses do they face? What else do you know about them?**

Step 4: Develop and Pretest Messages

Purpose: To develop effective messages that will resonate with your intended audiences and compel them to think, feel, or act in ways that support your communication goals.

Messages can be *informative* (convey new facts) or *persuasive* (alter attitudes, change behavior, or persuade action). Sometimes, they are both. Often, messages in a social marketing campaign have a progressive impact. To persuade intended audience members to change behavior, you may first need to inform and raise their awareness about an issue or program. If you can get them to agree with it, understand it, and believe it, then they may *act* on it.

Messages also can convey the key information you want audiences to know about your program. These messages can become the underlying themes highlighted and repeated in your materials and activities. They can be used as the basis of talking points, presentations, one-on-one discussions, or any other materials or other tactics intended for your audiences. For example, an overarching message running through all your materials might be that supporting your program's efforts is an *investment* in your community; the concept of investment could resonate with several different intended audiences, all of whom are affected by tight budgets and limited resources. For each intended audience, effective messages:

- Convey the relevance of sustaining the service or activity to *their* beliefs and values.
- Show the urgency of the program by relating it to the core concerns in their lives.
- Put a "face" on the issue or program.
- Motivate them to think, feel, and act.
- Use language that is as free of technical, scientific, or bureaucratic jargon as possible.
- Make complete sense to them.

In developing messages, remember: "It's not what you want to tell them, *it's what they can hear*." Tap into an existing thought, idea, or value of your intended audience (based on all that you have learned about them) instead of telling them what they *should* think or do.

Pretesting Messages

Even the most carefully crafted messages will not be effective if they do not resonate with your intended audience. Before moving forward to develop materials or activities, we urge you to pretest your messages *with* your intended audiences to determine if they are persuasive. Ask a few members of an intended audience for input. If you find that a particular message doesn't have the impact you envisioned, use this feedback to adjust your message *before* you create materials. This extra step could save a great deal of time and money in the long run. Pretesting methods are discussed in greater detail in Step 7 of this workbook on page 17.

Directions:

- Using your highest priority intended audience segment that you identified in Step 3, complete the questions on this worksheet. Refer to your findings from Step 3 as needed.

What **attitude** (the way they feel about an issue or program) or **behavior** (day-to-day actions) do you want to change in your intended audience?

List some of the **barriers** and **benefits** to your audience thinking and feeling about, or acting on, your issue.

Barriers	Benefits

Now, based on what your audience needs to hear in order to think, feel, or act differently, what is the **most compelling sentence** you could use to motivate the audience? This is your **message**.

How will you pretest this message to determine its likely success?

Step 5: Select Channels, Activities, and Materials

Purpose: To identify the most appropriate avenues for delivering your messages to your intended audiences.

Determining the most effective way(s) to reach your intended audiences means going back to the work you did in Step 3. Refresh your memory:

- What sources of information do they trust?
- Who or what might compel them to take the desired action on your behalf?
- How would they prefer to get your information?
- How and where do your intended audiences spend time? To what civic associations, faith-based groups, or other organizations do they belong?

Answers to these kinds of questions will help you deliver your messages effectively, but there are other considerations as well. You need to determine how you can ensure your communication will be:

- Appropriate for your goals and intended audiences.
- Delivered to your intended audiences in a timely manner.
- Aligned with your budget and resources.
- Tailored to your intended audiences' overall perceptions about suicide prevention and support services.

This step guides you to select the channels, activities, and materials you will use to deliver your message. Below are just a few examples that may be relevant to your communication plan and can help stimulate discussion with your partners.

Channels

Communication channels carry your messages to the intended audiences. Channels take many forms and there is an almost-infinite list of possibilities. Some examples of channels include:

People (you, your champions)	Television stations
Radio stations	Newspapers
Web sites	Community centers
E-mail, listservs	Laundromats
Malls	Parks
Schools	Libraries
Recreation centers	Nonprofit organizations
Supermarkets	Restaurants

Activities, Events, and Materials

Activities and materials are the tactics and tools used to send messages through the channels. Some possible examples would include:

Activities and Events	Materials
Suicide Prevention Week presentation	Fact sheets
News conferences	News releases
Community events	PowerPoint presentations
Conferences	Web sites
One-on-one meetings	Public service announcements/videos
Public testimony	Reports
Award ceremonies	Community report card
Family days	Flyers and brochures
Awareness Day open house	Bookmarks
Open houses	Posters

Frequency and Mix

Think for a moment about the commercial marketing world. No one ever bought a can of Coca-Cola after seeing just one television commercial. You've probably seen hundreds of commercials for Coca-Cola over the years. You've also been exposed to product placement in movies and television, store displays, billboards, magazine ads, and much more—all of it designed to make you think of Coca-Cola when you're thirsty.

When we talk about the number of times you're exposed to a product, we're talking about the "frequency." When we look at the number of different ways we're exposed to a product, we're talking about a "mix."

The same principles of commercial marketing apply to you and your program as well. You may need to make presentations to key decision makers. You may need to tap into your champions (teachers, families, and students) to speak on your behalf. You may need to work with local media to do stories on your issue. You may need to provide any or all of your audiences with materials that highlight your programs and illustrate outcomes in an easy-to-understand way.

This is what we mean by "frequency and mix." As you move to the worksheet on the next page, consider any and all channels, activities, events, and materials that can help you effectively deliver your message to your intended audience.

Directions:

- Thinking about the priority intended audience segment from Steps 3 and 4, use the worksheet below to identify the channels, activities, events, or materials that will most effectively deliver your message.
- Consider the frequency and mix of your delivery.

Goal:		
Intended Audience Segment:		
Message:		

Delivery Methods	Description (Mix)	How often? (Frequency)
Channel		
Activities and Events		
Materials		

Step 6: Develop Action Plan

Purpose: To determine where, when, and how each task will be done to successfully implement your communication plan.

This step makes sure all the hard work you've done sees the light of day. A great action plan makes the best use of everyone's time. It is tantamount to good project management.

We encourage shared participation in putting your plan on its feet. Commitment from staff members, partners, volunteers, and champions tells your community there is wide support for your goals—and it might encourage potential new partners to get on board.

Your action plan can be as simple or as complex as your needs require, but at a minimum, it should have the following essential information:

- A listing of major activities, tasks, and subtasks
- The target date for completing each task
- The person responsible for ensuring each task is completed.

Below is a sample of one task in a basic action plan:

Task/Subtask	Target Date	Person Responsible
• Make presentation to school board on supporting State legislation to fund school-based suicide prevention services.	April 15	James
• Draft and send letter to board chair asking for time to present at next board meeting.	March 1	James
• Meet with evaluator to get data on success of school-based suicide prevention services.	March 5	James
• Draft and ensure adoption of messages to be presented to board.	March 8	Jane
• Select three spokespersons for presentation (e.g., parent, community partner, and project director).	March 12	John
• Develop a PowerPoint presentation for use by project director.	March 20	Jane
• Draft 4-minute presentations to be made by parent and community partner	March 21	John
• Arrange for spokesperson rehearsals.	March 22	Joan
• Prepare packet of leave behind materials for board.	March 29	Jane
• Send out invitations to parents to attend presentation.	April 2	John
• Communicate with school board office on logistics for presentation day.	April 11	Joan
• Conduct rehearsal.	April 12	Jackie
• Ensure transportation to presentation site for spokespersons and selected invitees.	April 14	All
	April 15	Joan

Step 7: Develop and Pretest Materials

Purpose: To ensure that your materials will resonate with intended audiences before they are produced and used.

Communication and social marketing professionals have learned many lessons over the years about what makes a communication program or social marketing campaign effective. One of the most important lessons is the value of *pretesting messages and materials*. Having representative members of your intended audience review and comment on both messages and materials before they are produced or used is essential to the success of your communication.

Pretesting helps you:

- Identify whether your messages and materials have any major flaws.
- Explore alternative messages and materials.
- Fine-tune your messages and materials.

Typically, developing communication materials is a four-step process:

1. Develop prototype.
2. Review and pretest.
3. Revise and refine.
4. Produce.

There are several ways to pretest messages and materials, including:

- Surveys
- Focus groups
- One-on-one interviews
- Advisory boards.

Admittedly, if you're planning a face-to-face meeting with an individual who represents a potential partner for sustainability, it's tough to pretest your message or materials with him or her. In such a case, it's a good idea to rehearse your presentation and ask someone who isn't connected with your program's work to look at your materials. While you may not be able to gauge the impact of what you've developed, you'll at least be able to make sure that you're presenting information in a way that's easy for anyone to understand.

Don't forget: when creating communication materials, make certain to add time for pretesting into your action plan!

Step 8: Implement, Evaluate, and Modify Plan

Purpose: To determine if the plan is meeting your communication goals and, if not, to make appropriate and timely modifications to ensure success.

Managing a communication plan or social marketing campaign is an ongoing process. Implementation is only the beginning. Consider your communication plan a living document that's revised and fine-tuned over time.

To ensure your communication and social marketing efforts are effective and successful, you must specify how and when you will evaluate and, if necessary, modify your strategy and action plan. As you roll out your communication plan, we encourage you to create a feedback mechanism to monitor your success. If something in your program or campaign is not working, don't worry; it's okay to make the modifications necessary to get back on track.

To evaluate the effectiveness of your communication plan, this step asks you to:

- Determine which messages are (and are not) resonating with your intended audiences.

- Identify the channels, materials, activities, and partnerships that are (and are not) helping you to reach and engage your intended audiences.

- Identify obstacles that you had not anticipated.

- Identify any NEW intended audiences you had not recognized when starting this planning process.

- Create and implement new strategies for reaching your goals and objectives.

Congratulations!

By working through the exercises in this book, you have made a genuine commitment to the success and long-term sustainability of your program. You are now thinking strategically to:

- Make the most of your available resources and your realities.
- Set realistic and actionable goals.
- Identify the specific intended audience segments most likely to support your efforts.
- Craft messages that resonate with those audiences.
- Deliver those messages in ways that meet the needs and preferences of your audiences.

Additionally, you recognize that the best plans are worth no more than the paper on which they're written unless they are implemented. Now, you are ready to:

- Make an action plan that assigns tasks and due dates.
- Create, pretest, and produce any materials.
- Implement, evaluate, and modify your plan.

Moving Forward

The communication planning process may seem daunting, but it can be a critical tool for grantees who wish to leave a lasting footprint in their communities.

CRC and SPRC encourage you to create and then regularly review and revise your plan as needed. Look for information about our communication-specific Webinars on your grant listserv.

And, please feel free to contact your prevention specialist with any questions. He or she will be happy to assist you in tapping into the wealth of communication resources available to you.

Resources for Health Communication and Social Marketing

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Resources for Health Communication and Social Marketing, *continued*

JOURNALS

- **American Journal of Health Promotion**
  http://www.healthpromotionjournal.com

- **American Journal of Health Behavior**
  http://www.ajhb.org

- **American Journal of Public Health**
  http://www.ajph.org

- **Health Education & Behavior**
  http://www.sph.umich.edu/hbhe/heb

- **Health Education Research**
  http://her.oupjournals.org

- **Journal of Health Communication**
  http://www.gwu.edu/~cih/journal

- **Social Marketing Quarterly**
  http://www.tandf.co.uk/journals/titles/15245004.asp

WEB SITES

- **National Cancer Institute**
  http://www.cancer.gov/pinkbook

- **Social Marketing Institute**
  http://social-marketing.org

- **Health Canada's Social Marketing Network**
  http://www.hc-sc.gc.ca/english/socialmarketing/