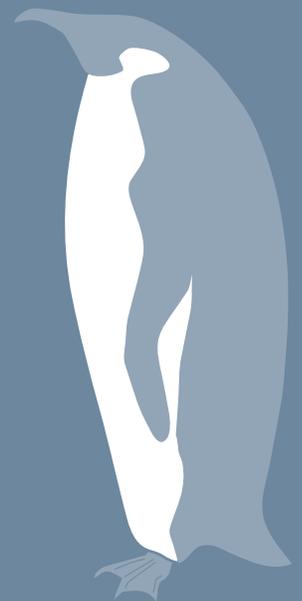


3.0

THE SPITFIRE STRATEGIES
SMART CHART™

Helping Nonprofits Make Smart Communication Choices



SMART CHART 3.0™

A Tool to Help Nonprofits Make Smart Communication Choices



Whether you are just starting the communication planning process, checking in on a communication campaign already in progress, or interested in reviewing an effort you have already executed, the Smart Chart 3.0 will help you assess your strategic decisions and create a high-impact communication program.

Strategic communication decisions are the building blocks of any successful communication planning and implementation effort. When used correctly, Smart Chart 3.0 will create stronger outcomes and help you use resources more effectively.

As you plan your campaign, fight the urge to think about specific actions or tactics. For high-impact communication, make sure your strategy drives tactics—not the other way around.

Communication is always happening. Effective communication doesn't just happen, it has to be planned for. The mere thought of planning for successful communication can be daunting and paralyze even the most experienced communicator with questions like: Where do we start? How do we do this? What do we need to think about? Too often, this leads to individuals and organizations communicating by the seat of their pants, which wastes resources and often goes nowhere.

Enter Spitfire Strategies' Smart Chart 3.0. Featuring feedback from thousands of trainings, workshops and planning meetings, Smart Chart 3.0 is the most effective version yet of this wildly popular communication planning tool. From choosing an objective and identifying a target audience, to crafting messages that will resonate and setting benchmarks for tracking progress, Smart Chart 3.0 helps users "think inside the box" and produce real, measurable impact by offering a step-by-step guide through all the choices that must be made to put a strong communication strategy in place.

Since Spitfire introduced the original tool in 2002, Smart Chart has been the cornerstone of countless successful social change campaigns around the globe. Proving the approach works for anyone, Smart Chart has been translated into multiple languages, including Spanish, French and even Tagalog.

Smart Chart 3.0 is an invaluable tool for creating a brand new communication plan, assessing a current effort or jumpstarting a stalled campaign. Thousands of nonprofit organizations and foundations have used this unique, straightforward planning tool to demystify the communication planning process and become smarter, stronger and more effective communicators.

So, grab a pen (or pencil), take a deep breath and turn the page to start planning your own effective communication campaign.

To download and print additional copies of the Smart Chart 3.0 (or the original Smart Chart) log onto www.smartchart.org. The site also includes a free interactive planning tool to further enhance your planning activities.



Getting Started

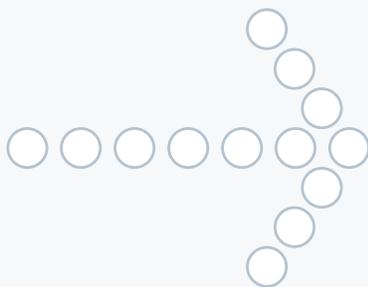
Creating your own communication strategy is not rocket science, but it does require time, commitment and focus. Building consensus among colleagues is not always easy—but it is necessary. Abdicating important decisions to only a few people will lead to less effective communication.

Smart Chart 3.0 features six major strategic decision steps:

1. Program Decisions
2. Context
3. Strategic Choices
4. Communication Activities
5. Measurements of Success
6. Final Reality Check

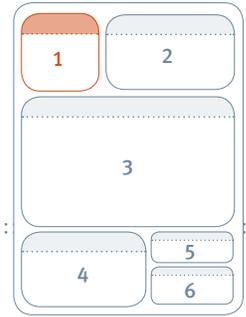
When making your strategic decisions, it is important to start with program decisions and proceed in order. For example, you need to establish your vision and objective before you select a decision maker. After all, if you don't have a clear objective, how will you know the best person to help you achieve it? Similarly, when making your strategic choices, identifying your audience must come before creating your message. How will you know what to say if you don't know who you are talking to? You get the idea.

Throughout the process, make sure to have a solid reason for each of your decisions. If you are relying on an assumption, examine it thoroughly to ensure that your strategy won't fall apart because of an untested guess. Only with a strong foundation for your decisions can you move on to the best way to get your messages to the right audience(s).





STEP ONE: PROGRAM DECISIONS



Lewis Carroll, author of *Alice's Adventures in Wonderland*, said, "If you don't know where you are going, every road leads you there."

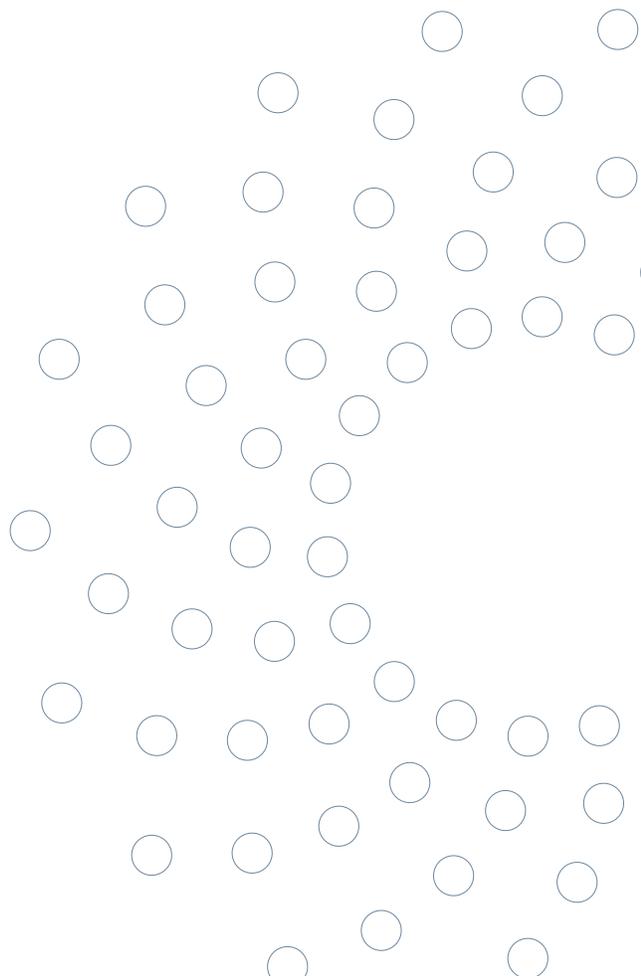
The good news is that you know where you are going. Identifying your vision, objective and decision maker at the beginning will help you get there. These are fixed points that do not change. Never lose sight of them. They are the key to creating a high-impact communication program.

1 What are you trying to do? YOUR VISION

All good communication efforts are rooted in a vision for change. What is the big, ambitious change that you want to make? What is your organization's mission? These core aspects of your work are vital components for your communication efforts because they will set the tone for, and inform, your strategic choices.

It's likely that your vision is not something you can achieve in a short period of time. Your goal might take 10, 20 or 30 years to achieve, but it's impossible to create a communication plan that will last that long. Consequently, most concrete communication strategies are fairly short-term—no more than 24 months—and that's the recommended time frame for your Smart Chart as well.

So how do you reconcile a 20-year vision with a two-year plan? Simple. Break your vision into smaller pieces. Then plan your communication efforts to support those incremental points of progress.





2

What concrete step will you take to achieve your vision?

YOUR OBJECTIVE

Communication strategies support an organizational vision, but there is a difference between vision and objective. Establishing concrete, measurable objectives is the next step in your overall plan for achieving your vision.

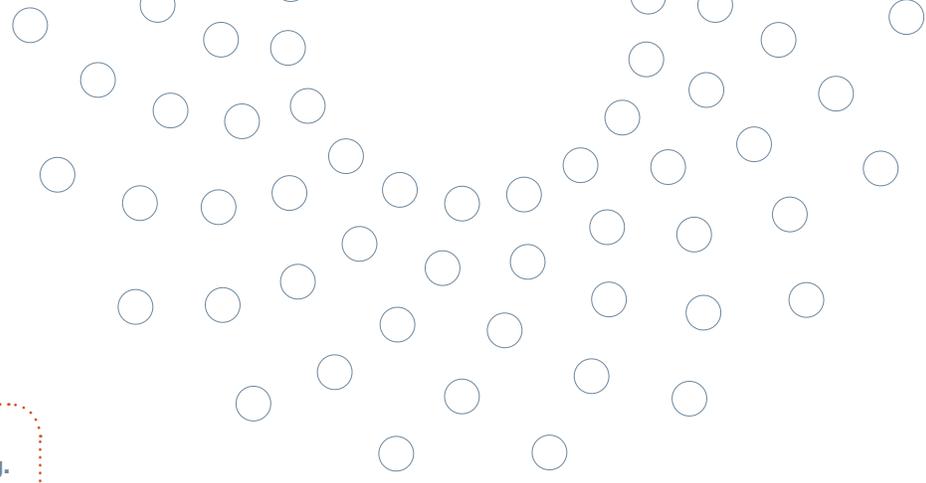
A well-defined objective is the most important component of a good strategy. If the objective is too broad, the decisions made from this point forward will be too vague, virtually guaranteeing an ineffective campaign. An ideal objective is measurable and should represent a definitive plan of action. In a word, your objective should be **SMART**:

Generally, divide your objectives into two categories: behavior change (altering the way people act) and policy change (altering government or corporate policy). These two objective types are dramatically different. Your organization may choose to pursue both types. It's highly unlikely that you'll be able to identify a single "silver bullet" objective that will allow you to achieve your vision or mission.

Specific
Measurable
Attainable
Realistic
Time-bound

More often than not, organizations need to pursue multiple objectives when working to achieve their missions. If your organization is pursuing this strategy, you should develop a separate Smart Chart for each objective because it is likely that the decision makers, audiences and messages for each objective will be quite different.

Different strategies are acceptable as long as they do not contradict each other. For example, Shape Up Somerville wanted to take a comprehensive approach to improving residents' health in this Massachusetts community. The city wide campaign established multiple objectives, including changing school lunch menus at all 10 elementary schools to meet specific nutritional standards; implementing the Healthy Eating and Active Time curriculum in key elementary schools and after-school programs; persuading 20 restaurants in town to offer smaller portions and low-fat options, thus becoming Shape Up-approved; and encouraging walking by establishing safe routes to school for all first- through third-grade students living within a half mile of their elementary schools. Although Shape Up Somerville pursued parallel objectives, each one required a distinct communication strategy, and therefore needed a distinct Smart Chart.

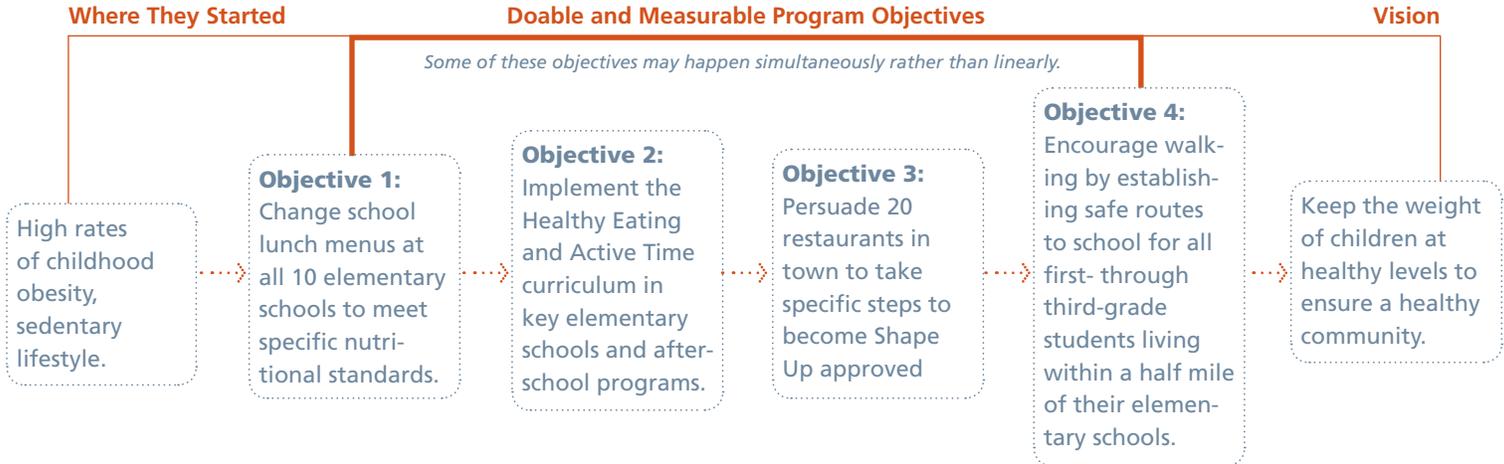


Watch out for vague objectives such as “raising public awareness.” Usually “public awareness” is not an objective in and of itself. It is a midpoint on the road to changing behavior or a means of putting pressure on political or corporate leadership. You could do a poll before and after your campaign and determine that many people were aware of your campaign, but it wouldn’t change their behavior or compel them to take action.

Ask yourself: Why do you want to raise awareness? Do you want to pass a bill, change consumer behavior, or decrease the cost of immunization shots? State a specific objective and then decide how you are going to measure your progress toward this objective. “Stopping global climate change” or “saving the children” are certainly worthy aspirations, but they are big visions, not concrete objectives. “Increasing the number of households who recycle” and “providing health care coverage to all children in our state” are achievable objectives.

Vision	Objective
Save the children.	Pass legislation this year to ensure that every child in the state has access to high-quality health care.
Save the environment.	Increase the number of households recycling in our community by five percent this year.
End food-borne illnesses.	Establish a single federal agency that oversees food safety by the end of next year.
End cervical cancer.	Within six months, get the top 200 companies for women (as rated by women’s magazines) to distribute educational materials to their employees.
Abolish the death penalty.	By 2013, provide DNA testing to every person in the country accused of murder.

SHAPE UP SOMERVILLE



3

Who makes your objective a reality?

THE DECISION MAKER



Identifying the decision maker is critical to creating a strong communication plan. This decision will help you select and prioritize your audience targets. The ultimate decision maker is the person who has the power to give you what you want—the person who can say yes or no to your objective. If your objective is to change behavior, the decision makers may be a specific group of people. For example, in a campaign to promote fair-trade-labeled coffee, coffee drinkers may be the decision makers. If your objective is to impact a corporate policy, the decision maker may be the head buyer or CEO of a company that can choose to offer the fair-trade label in its stores. If the objective is to change city, state or federal policy, the decision maker may be an elected official or an appointed staffer. Whoever ultimately can change a policy is your decision maker.

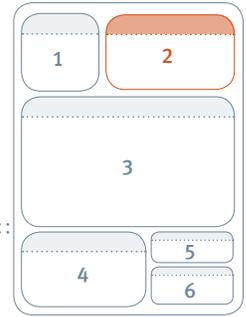
Later in the audience targeting section, you will decide if you are going to approach the decision makers directly or reach them through other people. Your organization may not have direct access to the decision makers. But once you have identified who you need to influence or activate, you can figure out how best to reach them.

STOP: Go to Smart Chart 3.0. Complete Step 1 by filling in your vision, objective and decision maker in the boxes provided.





STEP TWO: CONTEXT—THE INTERNAL AND EXTERNAL SCANS AND POSITIONING



Internal Scan

An internal scan assesses an organization's assets and challenges from a capacity perspective. What staff, resources and tools do you have to use? Is your organization a media machine, or is it comprised of academics that don't like to "dumb things down" when they talk to the press? Do you have access to in-house research or other knowledge that can help inform your strategy? Think about your reputation: Are you well-known or are you little-known? Are you a part of any coalitions or partnerships that can, or should, come into play for this effort? Remember, you control these attributes.

External Scan

An external scan is your best opportunity to assess the environment for your communication efforts. Take stock of what's happening around you that will affect your communication strategy. What is the present state of the debate on your issue? Are there timing considerations, or key events that you must factor into your strategy? Will timing be a constraint? What other organizations are working on this issue, and are they working with you or against you? What barriers might you face in getting people to take action on the issue? Are there misconceptions or misinformation that might get in the way of your communication efforts? What obstacles or opportunities might you encounter along the way? Are there groups on your side that you are competing with for your audience's attention? Are there natural communication opportunities you can leverage to help advance your strategy? What unexpected events could help or harm your efforts if they occurred?



For your internal scan, consider all the things you control that may impact your communication efforts.

Define Your Position:

Where is your organization in the debate?

Too many groups believe they need to frame the debate—i.e. that their issue has never been discussed. The truth is, there are most likely already-known facts, perceptions, players and opposition, and there is already a debate in play.

The key is to understand how an issue is currently perceived. First, ask stakeholders or other people with deep knowledge about the issue what they think. Then, to gain perspective, check the information you receive from those people against the information that people outside your issue have. Conduct a media audit to gauge how the media is covering the issue. After you consider all this information, assess your position relative to the current discussion.

You need to understand the existing debate—if there is one—to determine whether to focus your efforts on:

- a. **Framing** the debate because there isn't really a conversation on the issue yet;
- b. **Fortifying and amplifying** the existing debate because it's going well for you; or
- c. **Reframing** the debate because it isn't currently set up in a way for your organization to win.

Position 1: Frame. Framing a debate means there is no current discussion about the issue. You can't poll on the issue because no one would know what you were talking about. In fact, the idea is so new you might have to use a metaphor to explain it. There aren't any misperceptions because there is only limited information or knowledge on the issue. Issues for which there is no existing debate are rare, and it is then and only then that you have the opportunity to set the initial frame.

Bob Putnam's book *"Bowling Alone"* framed a new conversation about civic engagement. Putnam asserted that Americans were becoming disengaged from one another and from their communities. Rather than connecting with those around them, they were choosing to be alone, even while doing activities that were once done with teams or groups. In this case, there had been no discussion about civic engagement, so the issue was new.

Position 2: Fortify and Amplify. This position is used when the discussion is going well: you are winning the debate, people are agreeing with you, and there is no reason to spend time and money introducing a new frame. Simply stick with an existing frame, and use the majority of your efforts and messages to reinforce it.

For example, the concept of energy independence has been discussed since the 1970s, but it has enjoyed a renaissance in the last few years. When people talk about energy using an "energy independence" frame, they may focus on renewable sources of energy, creating new jobs, or cutting reliance on foreign oil. This frame makes new conversations possible and makes it difficult to oppose. After all, if you're not for energy independence, what are you for? Energy dependence?

Position 3: Reframe. If you are losing the debate and there is no way to win within the existing frame, it's time to switch gears. A common mistake is to continue to fortify and amplify a losing debate. Some groups believe that one more report or one more fact sheet will turn the tide, and people will start to embrace their positions. This is unlikely.

It's important to know when it's time to cut your losses. By changing the frame, you can create space for a new, more productive conversation. But remember that reframing an issue is often an uphill battle—it takes time and money, consensus among many organizations and spokespeople, and patience. The president of the United States might be able to reframe an issue more quickly and easily because the sphere of influence is so great. But, for most groups, reframing an issue requires a multi-year commitment.

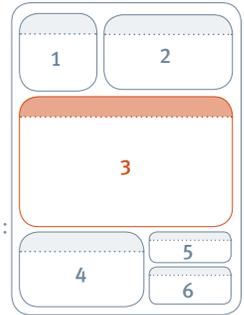
For example, for many years, gun safety advocates successfully used a "guns kill people" frame to advance new policies limiting the sale and possession of weapons. For gun-rights groups, this frame was a losing one. These groups responded with a very successful reframe by shifting the conversation from "guns kill people" to "people kill people." This new emphasis on personal responsibility was a gradual shift that happened over several years. Today, most conversations about gun control are in this frame.

STOP: Go to Smart Chart 3.0. Complete Step 2 by filling in your internal and external scans and determining your position.



STEP THREE: STRATEGIC CHOICES

Now it is time to determine your target audiences, including what they care about, how you are going to approach them, what you are going to say to them, and who is going to say it.



1 AUDIENCE

Who are the people who can move your decision maker(s) and help you achieve your objective? The more clearly you define your audience, the more strategic you can be about reaching that audience. You can segment your audiences by demography, geography and other categories relevant to your work. Examples of well-defined audiences include urban males under 25, suburban soccer moms, businessmen who travel frequently or family farmers in the Midwest. The key is to segment your audiences into the narrowest categories possible and group them based on their values and priorities.

How you reach each audience will be different based on a variety of factors, such as their interests and where they get their information about your issue. You can have several target audiences, but you should develop a different strategy to reach each one. You'll note the attached Smart Chart 3.0 is divided into columns to help you do just that.

In some cases, your target audience might be the same as your decision maker. For example, if your objective is to lower smoking rates in your town, the decision makers and the target audience will be the same—smokers—because they are the only ones who can decide to put down the cigarettes.

In other cases, you might target audiences that can help you influence the decision maker. For example, if your objective is to pass a law for smoke-free restaurants and bars in your town, and the city council is the decision maker, you might identify your audience as voters in a key council district who can help persuade their elected council member to vote yes. The focus would be on the audience(s) that have the greatest influence with the decision maker. In other words, if your objective hinges on a decision maker with whom you have little access or influence, who is the best audience to help you persuade that decision maker?



The “general public” is not a target audience.

Do not target the general public. The general public means everyone, and thus you have failed to target anyone. No message appeals to everyone. Your target audience must be specific, definable and persuadable.



The media are rarely a target audience. Media outreach is generally a means to an end—a tactic to reach other audiences. You can include media outreach activities in Step 4.

Your target audience is probably smaller than you think. When it comes to moving an issue, there is no magic number of voices that will guarantee victory. But the number of people needed to make change is not necessarily “as many as possible.” Small numbers can make big things happen. The trick is to identify the appropriate audience to help you achieve your objective. The smaller the target audience, the easier it is to create a focused campaign that will move the audience to action.

Audiences that serve as social reference groups on an issue—the people others look to when forming their opinions—can often be a good target. For example, in an effort to persuade the Bush administration to set clearer policies on interrogation of terror suspects in military custody, Human Rights First identified its target audience as retired military leaders, knowing that many Americans would defer to this group based on their experience and trusted positions of leadership.

Targeting audiences that are likely to inspire others to get involved is an effective way to communicate with a small number of people but end up with large numbers of supporters. It is also important to select audiences that are willing to show public support. Public proclamations such as bumper stickers and T-shirts build the perception of broad support and in turn, attract others to join.

Finally, focus on those you can persuade. Too many organizations are seduced into targeting their opposition instead of concentrating on an audience that might be undecided and could be swayed by thoughtful outreach.



2 READINESS

Think about the issue from your audience's perspective. Where is your audience when it comes to your issue? Are they ready for what you want to tell them? The most effective messages are designed to meet your audience where they are and move them toward your point of view. Think about communication in three stages: sharing knowledge, building will and reinforcing action.

- **Stage 1: Sharing Knowledge.** In this stage, the task is to share information about the issue without overwhelming the audience. People need basic knowledge on the issue before they can consider acting on it. Make the issue relevant to them by appealing to their values and lifestyles, or by connecting the issue to their families, friends or community. This initial information should include empowering solutions so your audience believes they can help make a difference.
- **Stage 2: Building Will.** Building will means overcoming the barriers that could stop your audience from taking action. In this stage, you are no longer sharing information. Instead, you are working to ease your audience's perceived risk. You can overcome the barriers by respecting the audience's comfort zone and asking them to take a manageable action that fits their lifestyle. You can also highlight a leader taking action first, or position the action as the social norm. You must offer hope for positive change, and show how the benefits of taking action outweigh the risks. Position your audience as the hero who must take action to make a difference.
- **Stage 3: Reinforcing action.** In this stage, you celebrate your victories with the people who helped make them happen. Once members of your audience take action, even minimal action, praise and thank them. A simple reminder that they've made an important contribution will make them more likely to act again.

(For more information on these stages of persuasion, see the full [Discovering the Activation Point™](http://www.activationpoint.org) report at www.activationpoint.org)



3 CORE CONCERNS

As you continue to consider your issue from the perspective of your target audience, determine what will compel the audience to move toward your objective. What does the audience already believe about the issue? You must be respectful of the audience's thoughts and opinions on the issue. Connect with their existing beliefs to build a bridge to your ideas and help them see your issue as personally relevant. People care more about an issue when it's presented in a way that aligns with their values.

Remember: This issue is about their value system, not yours. You cannot assume that if people know what you know, they will do what you do. Many people know that big cars have high emissions levels, but they choose to drive them anyway. Perhaps big cars make them feel safer. Perhaps smaller cars do not offer enough cargo space. If you want to connect with your target audience and make them your ally, you need to understand how they think. It is always easier to tap into a value someone already holds than to create a new one.

For example, in the battle to stop credit card companies from imposing exorbitant fees and interest rate hikes on customers who failed to pay on time, consumer advocates had to overcome the bias that customers who paid their bills late were irresponsible. "If people paid on time," many policymakers believed, "they wouldn't be subject to unfair charges." With this core value, it was difficult to make the case for reform and get relief.

Then consumer groups started talking about credit card companies in a different way. They exposed the companies who set traps specifically designed to entangle consumers in a financial mess. The conversation became less about the irresponsibility of the cardholders and more about the credit card companies that took advantage of the consumers. This shift tapped into the value of the target audience, who in turn helped reform the policies.



Tap into your audience's existing concerns to help make your issue personal. Following are quotes from people who participated in a focus group on this issue.

- "If you're reaching out for my help...understand that I'm busy, that I have a life, that there are lots of things that are important to me. If you do that, I'll be more apt to listen to your message."
- "The most important thing is relevance—the things that directly affect my life and the people I care about. That makes acting worthwhile."

You must also identify the barriers that might prevent your audience from hearing what you have to say. People have long and varied lists of reasons for not taking action. To really be heard, you must anticipate and overcome those barriers. In some cases, you might be asking your audience to step outside their comfort zones. Understanding the risks and rewards your audience associates with your issue can help you have a much more productive conversation.

The best way to convince audiences to support and take action is to ensure that your issue fits within their lifestyles. For example, Movember is a campaign that raises funds and awareness for prostate cancer by encouraging men to grow mustaches throughout the month of November. While men grow mustaches, they ask their friends and family to donate money to the cause. Although this strategy might seem unusual, it provides an opportunity for men to get involved in an issue that is in line with their lifestyle. And it works. In 2011, Movember raised \$99,463,363.

Identify numerous persuasion possibilities. Once you've made your list, review your objective and target audience, as well as your internal and external scans. Based on what will be most motivating to your audience and what you can legitimately link to your issue, choose the most appropriate concern to tap into and the barrier you'll need to overcome. Analyze your choice. If it seems unrealistic, rethink your decision. If you've identified multiple barriers that might prevent your audience from engaging, choose the one that is most important to overcome—the "deal breaker."

4 THEME

Theme is the big picture you want to convey to the audience—it defines how you'll approach the conversation. Think of it this way: If the value is defined as the importance of something to a target audience, then the theme helps determine how we talk about that value to make the biggest impact.

In anti-smoking campaigns, the objective is always the same: reduce smoking. But the themes are different, depending on the different values of the target audiences. For example, teenagers value independence. Several campaigns believe that the most effective way to engage this value is to portray "big tobacco" as the "bad guy." The Truth Campaign shows kids how big tobacco companies manipulate them. The Campaign for Tobacco Free Kids perpetuates the "bad guy" theme by releasing marketing plans that prove tobacco companies focus on making cigarettes appealing to kids.

Although the objective is the same—to reduce smoking—the value changes when the audience changes. The DeKalb County Board of Health and DeKalb Putting Prevention to Work run an anti-smoking campaign aimed at engaging parents who are concerned about secondhand smoke (the theme) affecting their children (the value). The campaign uses videos to vilify secondhand smoke preaching, "When you smoke around your kids, it's like they're smoking." To see one, check out YouTube, "Secondhand Smoke PSA – Like They're Smoking."

In anti-smoking campaigns targeted toward teenage girls, the underlying value is that all teenage girls focus on appearance—they want to look good. The most effective campaigns show that smoking makes them less attractive. Smoking Is Ugly, an effort by Christy Turlington, uses this theme effectively. Internet sites also use statistics to illustrate how smoking makes teens smell, is grosser than picking your nose, and causes bad skin and bad breath.

Different audiences and different values all require different themes—making big tobacco the "bad guy," vilifying secondhand smoke, and showing how smoking makes you less attractive. The key is to select a theme that focuses on the value of your target audience, not on your own value.

Consider the tone as well. An optimistic tone can help empower and motivate your audience to engage with your organization.

And remember, different themes might emerge from the same value. The key is to determine the theme that works best for your audience. Once you pick a theme, stick with it throughout your communication efforts. The Smoking Is Ugly campaign features a model to appeal to the value of attractiveness. One advertisement states, "Tobacco free: It's a beautiful thing." A 1980 campaign featured a woman with cigarettes sticking out of her ears, with the tag line "Smoking spoils your looks." All these efforts appeal to the same value, with slightly different themes.

5 THE MESSAGE

By now you know the audience you want to reach, how you might persuade them, and what theme you will use. Now you need to decide what to say. Again, it is important to consider your audience's value system, not your own. Review the persuasion points you identified earlier. Keep in mind these words of wisdom: "It's not what you want to tell them, it's what they are willing hear."

The message should resonate with the target audience. To test your message, ask the following questions:

- Is your message based on the audience's core concerns?
- Does it overcome—not reinforce—their barrier?
- Is "the ask" in the audience's comfort zone? If not, does the benefit offered outweigh the risk?
- Does the message offer a vision or emphasize a personal reward? Does it convey hope toward success?
- Is it consistent with the theme throughout?



No MY-EYES-GLAZE-OVER words or phrases: Don't use acronyms or jargon in your messages.

For an anti-litter campaign in Texas, campaigners targeted young men who didn't really care about the environment or littering, but did feel enormous pride when it came to their home state. Keeping this value in mind, campaigners built messages that focused on the theme of state pride rather than littering. "Don't Mess with Texas" became a rallying cry about Texas rather than litter. The campaign was enormously successful.



A message is not a re-worded mission statement.

6 THE MESSENGER

The people who deliver your message are just as important as what they say. The right message delivered by the wrong messenger (one with no credibility with your target audience) will often be ineffective or ignored. The It Gets Better Project™ aims to prevent lesbian, gay, bisexual and transgender (LGBT) teen suicides by getting adults to spread a message of hope to young people. A variety of messengers, including gay adults, politicians such as President Obama and Nancy Pelosi, celebrities such as Katy Perry and Tom Hanks, and employees at corporations, such as Google and Facebook, recorded video messages in support of the campaign. The choice of messengers for this campaign was critical. Ordinary gay adults had a unique message that could resonate with LGBT youth, but it took high-profile figures to reach a much larger audience. Within a year of launching this effort, the project grew to a worldwide movement, inspiring more than 30,000 videos that were viewed more than 40 million times.



"Current media landscape plus increased skepticism requires multiple voices and channels. You have to repeat something up to 10 times before someone believes it. It's not just the CEO, the experts and people like yourself that we trust, it's all of the above and in multiple channels. Think about your media cloverleaf. You have four components: the mainstream media, new media, social media and owned media. You've got to play in every part of the cloverleaf with different spokespeople."—Richard Edelman, president and CEO, Edelman, a public relations firm, in *2011 Edelman Trust Barometer Key Findings*.

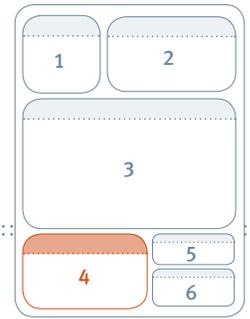
Through research, environmentalists found that seafood consumers listened to and trusted food purveyors—especially chefs—with information about what they should or should not eat. Similarly, chefs had great credibility with government decision makers because many chefs could report from firsthand experience that fish markets had declined over the years. Their words resonated with the target audiences and they became highly effective spokespeople. Environmentalists alone could not have delivered the same message and had the same impact.

STOP: Go to Smart Chart 3.0. Complete Step 3 by filling in each of your strategic decisions. Be sure to give each decision a "reality check" using the tips provided.



STEP FOUR: COMMUNICATION ACTIVITIES

In this section, your communication strategy starts coming together as you identify tactics, plot them on a timeline and assign key tasks to the people who will help implement your strategy.



Tactics: Communications tactics are the ways you carry the chosen message to the chosen audience. Tactics can include meetings, websites, newsletters, press conferences, letters, phone calls, paid advertising or other means for getting your message out to your audience.

Once you've made all the strategic communication decisions, you can choose the communications tactics that work best. These tactics should reflect your objective, internal and external scans, audience target and message.

The best communication efforts use the most direct tactics. For example, to reach an internal audience, you might use a simple newsletter or email instead of a full-scale advertising campaign. Remember to choose the tactics that are most appropriate for your target audience. Using Twitter to reach young people is a perfect tactic, but using it to reach seniors is not. Your tactics should always be in line with your objective, and should match the theme and tone you've chosen for your communication.

Above all, the tactics should be realistic. Better to have a handful of smart, well-executed activities than to overextend yourself and end up with many tactics but little impact.

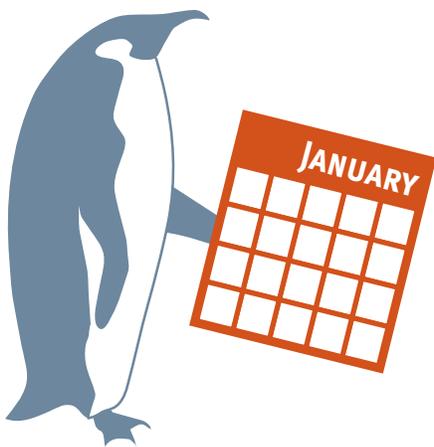
Timing: Now that you've determined the activities in your communication strategy, begin to plot out the timing. Be sure to note natural communication opportunities such as Back-to-School Day or Breast Cancer Awareness month. Think about the opportunities you can create for yourself through events, earned media and other activities. Plan ahead for the unexpected—sometimes events beyond your control can present a chance to connect with your audiences. And be realistic: You can't communicate with audiences 24/7. Your organization probably can't sustain it, and you run the risk of compassion fatigue when your audiences grow weary of hearing from you.

Consider other organizational commitments such as board meetings and big fundraisers to ensure your communication effort gets the attention and focus it needs. Begin to integrate your communication strategy into your overall work plan.

Assignments: The biggest step toward putting your strategy into action is to assign key tasks to the people who will help you. Identify the staff, volunteers, coalition partners and other key players who will take part in your communication operations.

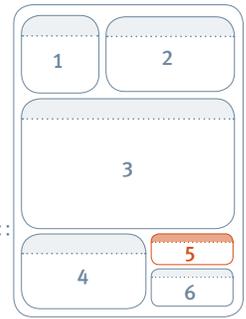
Budget: Time and money are finite resources. Think carefully about how much of each you will allocate to your strategy's implementation. Be realistic about what you can accomplish given the people and dollars available. Your internal scan may provide valuable information about your capacity.

STOP: Go to Smart Chart 3.0. Fill in possible tactics to reach your key audiences, as well as timeline, assignments and budget. Only write down viable tactics. You can change or add tactics as your effort moves forward.





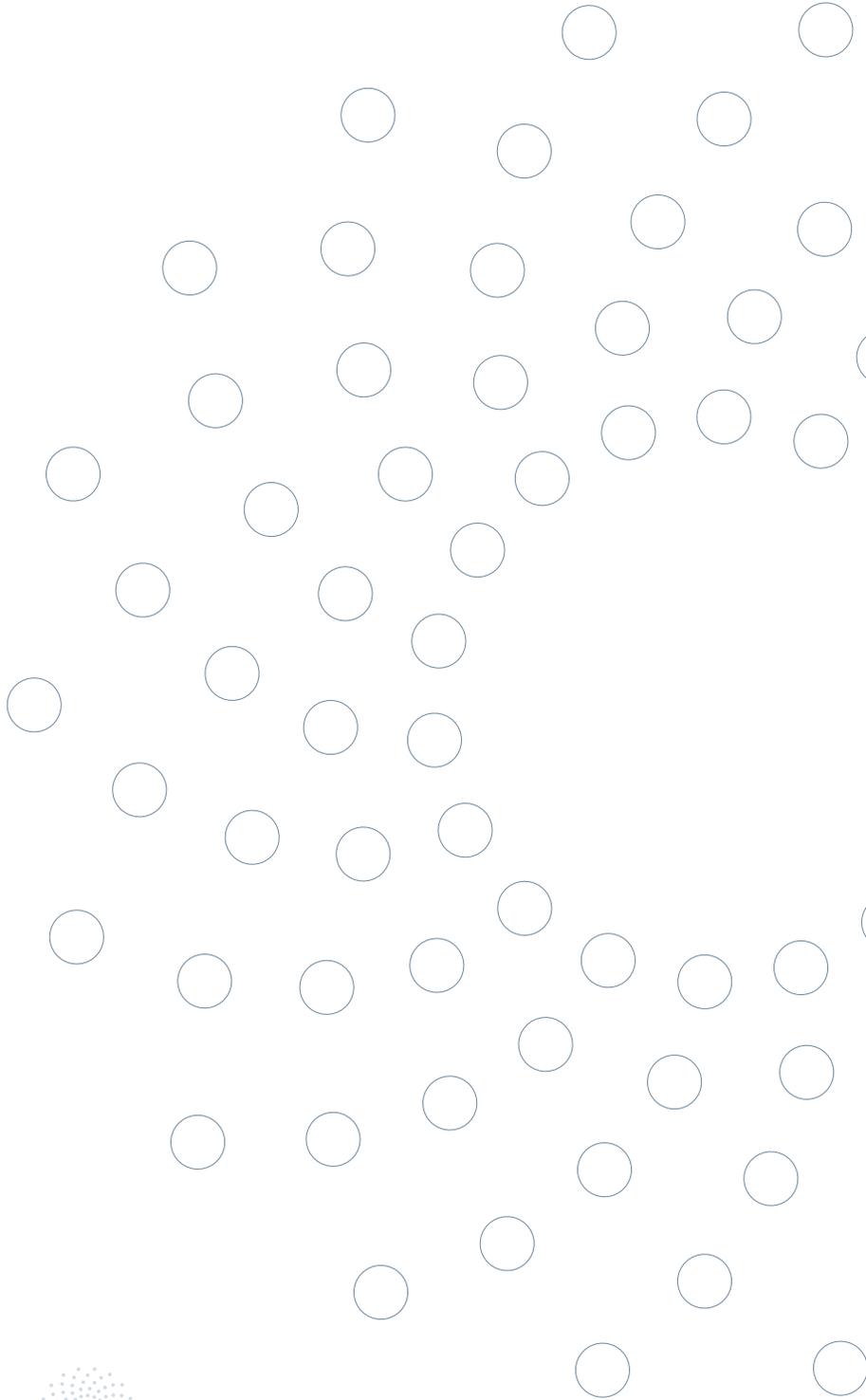
STEP FIVE: MEASUREMENT OF SUCCESS



As you implement your strategy, it is important to monitor your progress. Identifying both quantifiable (statistics) and anecdotal (stories) to measure success helps you show progress to internal audiences such as staff and volunteers as well as external audiences such as funders and policymakers.

The measures of success should be a mixture of outputs and outcomes. Think of outputs as measures of your efforts, the things you are doing to move your strategy forward. Outputs can include generating more news articles, creating a video message from your CEO for your website or writing an elevator speech. Outcomes are the changes that occur because of these outputs. If you generate more news articles, then a politician might see the coverage and invite a representative from your organization to testify at an upcoming hearing. Supporters might view a video message from your CEO as more inspirational than a letter and decide to get more involved. If you write an elevator speech and share it with your staff, they might be better prepared to promote your organization, which could lead to more partners or resources.

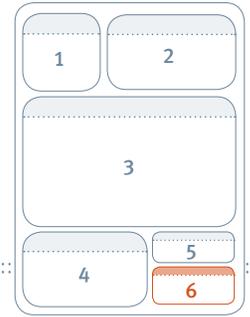
The purpose of your communication strategy is to ensure that your messages are getting to the right audiences and that those audiences are doing what you want. Define and analyze messages throughout the communication program. It's common to save this exercise for the end. Please don't. If your strategy isn't working, you need to know as soon as possible so you can save time and money by revising and refining it. Revising your communications is a reality of communication efforts. It is not a sign of failure, so don't be afraid to review and reconfigure campaigns as you acquire more data or information. And charting measurements of success will help.





STEP SIX: FINAL REALITY CHECK

Test your strategy before you put it into action. All the strategic decisions should align to create a consistent approach. Make sure your logic holds up to scrutiny before you begin to invest time and money in your strategy. Examine the rationale behind your strategic decisions and test your reasoning to ensure your choices are sound.



Test your strategy for accuracy by asking the following:

- Is the strategy doable?
- Are your choices consistent? Does the logic flow from one box to the next? (Tip: Try testing your decisions backwards—i.e., by accomplishing these tactics using these messengers, we will deliver these messages, supporting this theme, tapping into these values, moving this target audience, and so forth. Does the logic work as well in reverse as it did when you worked through Smart Chart 3.0? By going backwards, you are more likely to recognize faulty logic or disconnects between decisions and steps. If the logic doesn't work in reverse, go back and address the trouble spots.)
- Are you motivating the right people to take the right action at the right time?
- Are there any assumptions or guesses built into the strategy that require further research to confirm or correct?
- Will the tactics move you toward your objective? Will they reach the appropriate audience(s)?
- Are you using the best persuasion practices, such as respecting the audience's lifestyle, sharing hope, making them the hero, positioning the issue within the social norm, and so forth?
- Are there other objectives you need to add to the Smart Chart? Be sure you're taking a comprehensive approach to meeting your overall goals.
- Is there buy-in from your organization to implement the strategy?
- Can you measure progress?

If you answered no to any of these questions, go back and work through your choices again. Run all of your strategic decisions through these questions whenever you update or adjust your strategy. You can also tailor this list based on your communication strategy and use it to assess tactical ideas as they are presented.

STOP: Go to Smart Chart 3.0. Fill in your measurements of success and use the checklist of questions to test your strategy.

Ready, Set, Go...

Now it's your turn. Develop an upcoming or current communication campaign by using Smart Chart 3.0. You can also use this tool to evaluate past efforts.

Important reminder: Make your choices in order as you follow the chart. Each decision you make will affect all the rest of your choices and decisions.

Good luck and have fun.

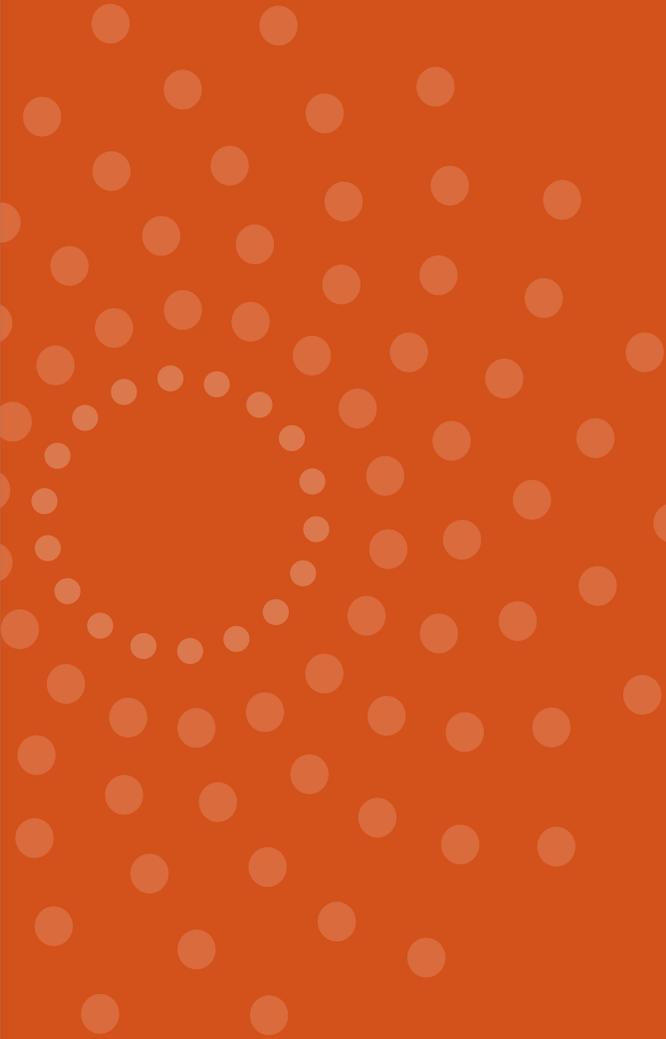
Note: This guide highlights examples of organizations that have used communication to educate segments of the public as well as policymakers. The examples in this guide are used solely to illustrate points and are not intended to advocate for specific legislation. Communication efforts that involve specific legislation could constitute lobbying and must be accounted for according to lobbying laws that govern 501(c)(3) activity.

Smart Chart 3.0 was created by Spitfire Strategies.



Spitfire Strategies provides strategic communication solutions to promote positive social change. Our objective is to help social change organizations use their voice in a strong, clear and compelling way to articulate their vision of a better world. To learn more about Spitfire Strategies, or download additional copies of Smart Chart 3.0, visit our website at www.spitfirestrategies.com.

Spitfire Strategies wishes to thank the many people who helped bring this publication to life.



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