

8-STEP STRATEGIC COMMUNICATIONS MATRIX

RESEARCH

- 1. BACKGROUND** Planning begins with a synthesis of primary and secondary research. It provides background information on the industry, external environment, organization, product, service or issue. It includes a stakeholder analysis and segmentation study that identifies current trends in opinions, attitudes and behaviors. Resources such as staffing, facilities and intervening publics are also identified.
- 2. SITUATION ANALYSIS** The situation analysis consists of two paragraphs. The first paragraph is a statement of the current situation and a description of the challenge or opportunity based on research. The second paragraph identifies potential difficulties that could impede success.
- 3. CORE PROBLEM/ OPPORTUNITY** The core problem/opportunity is a one-sentence statement of the main difficulty or prospect including likely consequences if not resolved or realized.

ACTION PLANNING

4. GOAL AND OBJECTIVES

Goal The goal is a one-sentence statement of the overall result needed to solve the problem or seize the opportunity. The goal does not have to be quantified.

Objectives Objectives are statements of specific results that lead to achieving the goal. Objectives must be specific, written, measurable, attainable, time-bound, cost conscious, efficient and mission-driven. Evaluation criteria and tools should be included in written objectives. Key publics become obvious if objectives are clear.

5. BIG IDEA, KEY PUBLICS, MESSAGES, STRATEGIES AND TACTICS

Big Idea A “big idea” is a creative strategy on which to build your entire campaign. It appeals broadly across all key publics. Describe your big idea in one sentence. Then include a bullet for each of these three components: Big idea strategy, visual representation and slogan/hashtag.

Key Publics Key publics include a description of each group that must be reached to achieve the goal and objectives. Identify:

- Objectives accomplished by key publics
- Demographics and psychographics
- Relationship with organization or issue
- Opinion leaders
- Motivating self-interests
- Viable communication channels

Plan specific messages, strategies and tactics for one public before moving to the next public.

ACTION PLANNING

Messages Message design is public-specific and focuses on self-interests. Create a small number of primary and a larger number of secondary messages for each public.

Primary messages are short summary statements similar to sound bites. They identify a category of information and/or communicate what action you want a public to take. They also tie the desired action to a public's self-interest(s).

Secondary messages are bulleted statements that give credibility to the primary message with facts, testimonials, examples and stories. They provide the ethos, pathos and logos of persuasion.

Strategies Strategies identify what a public must do to fulfill an objective and the channel(s) through which messages will be sent to motivate that action. Multiple strategies may be required for each public.

Tactics Tactics are the creative elements and tools used to deliver messages through specific channels. Several tactics are required to support each strategy. Examples are story placements, YouTube videos, Twitter posts, special events, infographics, websites or blogs.

6. CALENDAR AND BUDGET

Calendar Planning calendars show when each tactic begins and ends and the relationship of publics and tactics to each other in a time continuum. Calendars are organized by public and strategy to show the work required. A Gantt chart is recommended.

Budget Budgets are also organized by public and strategy. The budget projects the cost of each tactic. It also indicates where costs will be offset by donations or sponsorships. Subtotals are provided for each strategy and public.

COMMUNICATION

7. IMPLEMENTATION

Project Management The campaign calendar is used to direct the whole campaign. Implementation task lists break tactics down into component tasks and help you track them to completion. The budget helps you manage costs compared with projections.

Quality Control Quality control checklists remind creators and editors of common mistakes. Strategy briefs help to assure tactics are aligned with strategies.

EVALUATION

8. EVALUATION CRITERIA AND TOOLS

Criteria Evaluation criteria are the desired results established by and included in the objectives.

Tools Evaluation tools are the methodologies you use to gather the data. These tools must be included in the objectives and in the calendar and budget.