THE SPITFIRE STRATEGIES SMART CHART 3.0

An Even More Effective Tool to Help Nonprofits Make Smart Communications Choices

Spitfire Strategies

THE SMART CHART FOR COMMUNICATIONS

A Tool to Help Nonprofits Make Smart Communications Choices

Whether you are just starting the communications planning process, checking in on a communications 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 to ensure that your communications strategy delivers high impact.

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

Fight the urge to think tactically in the beginning. Strategic decisions must be made before you settle on tactics. To create a high impact communications effort, strategy must drive tactics—not the other way around.

What's New?

For those already familiar with previous versions of the tool, here's a snapshot of what's different. At the center of this document, you will find Smart Chart 3.0 – an even more effective strategic communications tool that builds upon the original Smart Chart. You can remove the chart – or leave it attached. As you work your way through the planning exercises, stop and fill in sections of the chart. If you follow all the steps – in order – you will finish with a solid communications strategy.

For big fans of the old Smart Chart, don't panic. We made only slight modifications, primarily to reflect feedback from more than 500 trainings and workshops with nonprofit organizations and foundations for how to make this tool even more user-friendly and effective.

Other updates reflect the findings from our research on the Activation Point™. In December 2006, the Communications Leadership Institute partnered with Spitfire Strategies to research the best practices of persuasion. Through focus groups, case study research, an extensive literature review, brainstorms with an expert panel, and a proprietary research tool called PowerGames, we developed recommendations for the best strategies and approaches public interest groups can use to create change by getting the right people to take the right action at the right time. To access the full report, visit www.activationpoint.org.

Based on the Activation Point, we've updated the Smart Chart with a new section on audience readiness that will help you gauge the stage of persuasion you need to work through with your audience(s). We've simplified some sections of the tool to streamline your planning process and reformatted the Smart Chart to account for communications efforts designed to engage multiple audiences. We've also added a section to help you plot your communications activities on a timeline and assign key tasks to the key players on your communications team. Finally, we've added a section on implementation and evaluation to help you test the rationale for your strategy, and set benchmarks to measure your progress as you put the strategy into action.

Our best advice:
Think inside the box

Smart Chart 3.0 can make your communications reach and impact even more effective. But despite the changes, we still want you to "think inside the box" and make the decisions in order.

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

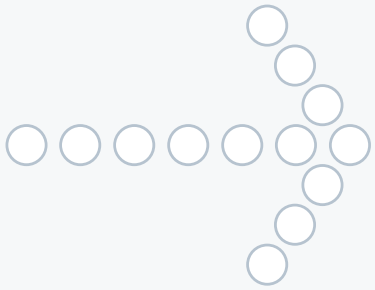
Getting Started

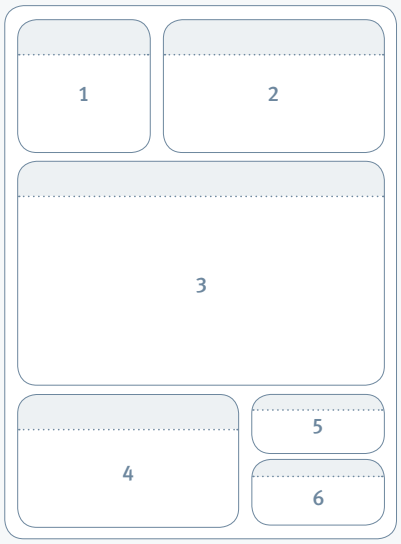
This process is not rocket science, but it does require time, commitment and focus. Building consensus among campaign partners around the decisions you need to make is not always easy – but it is necessary. Abdicating decisions will lead to less effective communications.

The Smart Chart features six major strategic decision sections:
1. Program Decisions (Broad Goal, Objective, Decision Maker)
2. Context (Internal and External Scans and Position)
3. Strategic Choices (Audience, Readiness, Core Concerns, Theme, Message and Messenger)
4. Communications Activities (Tactics, Timeline, Assignments and Budget)
5. Measurements of Success
6. Final Reality Check

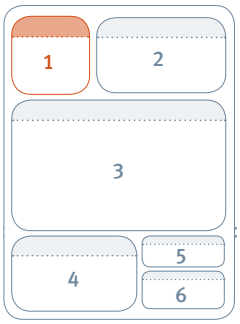
When making your strategic decisions, start with Program Decisions and go in order. Establish your objective before you select a decision maker. If you don't have a clear objective, how will you know who ultimately will make the decision that helps you achieve it? Similarly, audience must come before message. How will you know what to say if you don't know who you are talking to? You get the idea.

Have a solid rationale for each of your decisions. If you are relying on a big assumption to make the decision, examine it to ensure your strategy won't fall apart because of an untested guess. Only with a strong foundation for your decisions can you move on to how to get your messages to the right audience(s) through effective implementation.





STEP ONE:
PROGRAM DECISIONS



The first step: Identify your broad goal, objective and decision maker. Communications planning CANNOT happen before these decisions are made and you establish the three guiding points for your efforts.

The Guiding Points –
BROAD GOAL, OBJECTIVE, DECISION MAKER

Lewis Carroll said, "If you don't know where you are going, every road leads you there." The good news is you know where you are going. These key points will guide your strategic communications decisions and strategies. They are fixed points. Never lose sight of them. They are the key to having a high-impact communications program.

1 What are you trying to do?
BROAD GOAL

All good communications efforts are rooted in a vision for change. What is the big, hairy, ambitious goal you have for changing the world? What's the vision that your organization's mission is rooted in? These core aspects of your work are vital grounding for your communications efforts, as they will inform your strategic choices and set the tone of your efforts.

It's likely that your vision is not something you can achieve in a short period of time, but instead is a long-term goal that might take 10, 20, 30 years or more to achieve. It's impossible to create a long-term communications plan, because the environment can change dramatically in just a few years, or even less. Consequently, most concrete communications strategies are fairly short term, about 12-18 months – and that's the recommended time horizon for your Smart Chart, too. So how do you reconcile a 20-year vision with a 12-month work plan? The solution is to break your vision into smaller pieces that will help you incrementally achieve your grander goals. Then plan your communications efforts to support those incremental points of progress.

2 What concrete step will you take to achieve your vision?

YOUR OBJECTIVE

Communications strategies support an organizational vision, but there is a difference between vision and objective. Your objective is the next step in your overall plan for achieving your vision.

Flowing from your vision, you can establish a concrete, measurable objective. 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 on will be vague, virtually guaranteeing an ineffective effort. This objective must be measurable and should represent a definitive plan of action. Your objective should be **SMART:**

Specific
Measurable
Attainable
Realistic
Time-bound

Generally, objectives can be divided into two categories: behavior change and policy change (which can mean government or corporate policy). These are two dramatically different objective types. Your organization may choose to pursue both types as part of your effort. 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 in one fell swoop.

More often than not, in working to achieve their vision, organizations need to pursue multiple objectives. If this is the case, you should develop a separate Smart Chart for each objective since it is very likely that the decision makers, audiences, and messages for each objective will be quite different. It is fine to have different strategies as long as they do not contradict each other. For example, Shape Up Somerville wanted to take a comprehensive approach to improving health in their Massachusetts community. So they set multiple objectives including changing school lunch menus at all 10 elementary schools to meet specific nutritional standards; implementing Health Eating and Active Time curriculum in key elementary schools and after-school programs; persuading 20 restaurants in town to take specific steps – such as offering smaller portions and low-fat options – to become 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 school. Though Shape Up Somerville pursued parallel objectives, each one required a distinct communications strategy (and therefore a distinct Smart Chart).

No "silver-bullet" goal setting.

Watch out for vague objectives like "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 find out that many people are aware of your issue, but didn't change their behavior or 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" or "providing health care coverage to all children in our state" are achievable objectives.

Mission	Objective
Save the children	Pass legislation this year to ensure every child in the state has access to quality health care
Save the environment	Increase the number of households recycling in our community by 5 percent this year
End foodborne 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 best companies for women (as rated by women's magazines) to distribute educational materials to their employees about screening
Abolish the death penalty	By 2010, provide DNA testing to every person in the country accused of murder

Where They Started — **Doable and Measurable Program Objectives** — **Broad Goal**

High rates of child obesity, sedentary lifestyle.

Change school lunch menus at all 10 elementary schools to meet specific nutritional standards;

Implement Health Eating and Active Time curriculum in key elementary schools and after-school programs;

Persuade 20 restaurants in town to take specific steps to become Shape Up approved;

Encourage walking by establishing Safe Routes to school for all first- through third-grade students living within a half-mile of their elementary school.

Keep children's weight at healthy levels, for a healthy community.

3 Who makes your objective a reality?
DECISION MAKER

Make Program Decisions

Broad Goal

↓

Objective

↓

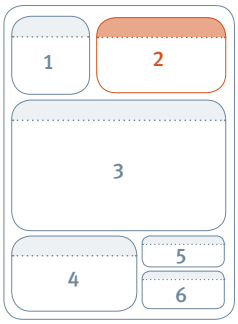
Decision Maker

It is critical to identify the decision maker you are ultimately trying to reach. It will guide you in making choices about who your target audiences are. 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 maker may be a specific consumer group. For example, coffee drinkers may be the decision maker in an effort to promote fair-trade-labeled coffee. 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 city, state or federal policy, the decision maker may be an elected official or an appointed staffer. Whoever ultimately votes for or 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 they listen to most. Your organization may not have immediate or direct access to the decision maker(s). But once you have identified who you ultimately need to influence or activate, you can figure out how best to get to them.

STOP: Go to the chart and complete Step One by filling in your broad goal, objective, and decision maker in the boxes provided.

STEP TWO: CONTEXT

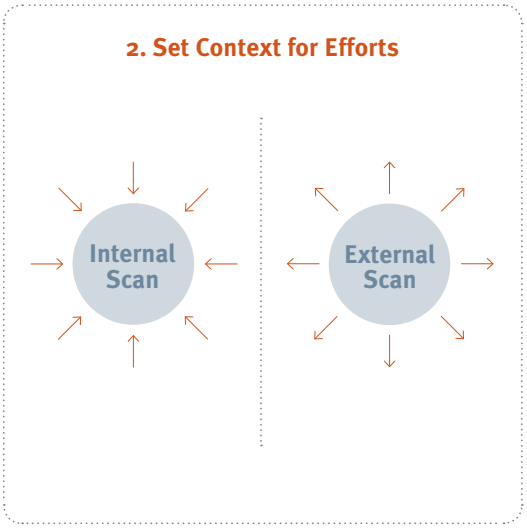


Internal Scan

The internal scan assesses an organization's assets and challenges from a capacity perspective. What staff, resources and tools do you have to use when planning your communications? Are you a media machine, or do you have a lot of academics who 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?

External Scan

The external scan is your best opportunity to assess the environment for your communications efforts. Take stock of what's happening around you that will affect your communications strategy. What's the present state of debate on your issue? Are there timing considerations for your issue, or key events 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 on your issue that might get in the way of your communications efforts? What obstacles or opportunities might you encounter along the way? Are there natural communications opportunities you can leverage to help advance your strategy? What unexpected events could help or harm your efforts if they occur?



Define Your Position:
Where is your organization in the debate?

Too many groups start a communications effort as if no one has ever discussed their issue before. The truth is, there are usually known facts, perceptions, players, opposition, and a debate already in play.

The key is to understand how an issue is currently perceived. First, ask stakeholders or other people with deeper knowledge than the average person. What do they think about the issue? Then, check that against those outside your issue area to gain perspective. Conduct a media audit to gauge how the media is covering the issue. Consider all this information, then assess your position relative to the current discussion of the issue.

You need to understand the existing debate – if there is one – before you can determine whether to focus your efforts on **framing, forifying and amplifying** or **reframing** the existing debate:

Position 1: Frame. Most organizations think they are here, but it's rare that they actually are. 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 a lot of misperceptions because there isn't yet a lot of knowledge. Issues for which there is no existing debate are rare, but 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. In it, he asserted that Americans are becoming disengaged from each other and from our communities – rather than connecting to those around us, we are choosing to do alone activities that once were done with teams or groups.

Position 2: Fortify and amplify. This is where the debate has already been set in motion, and the terms are favorable to your objective. You can stick with the existing terms of the debate and spend the majority of your efforts reinforcing them, because the discussion is going well and people are agreeing with you, and there is no reason to spend the time and money required to shift the conversation.

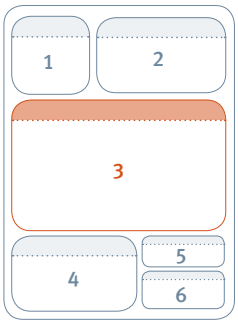
Advocates of Smart Growth find themselves fortifying a winning frame. When the debate over urban sprawl began to heat up in the 1990s, environmental groups did an excellent job of framing the conversation. When pro-development groups attempted to paint environmentalists as anti-growth, they responded by saying they were not against growth, and in fact they were for smart growth. Today, this frame continues to be successful for environmental groups, and thus they continue to fortify and amplify it, because it is largely opposition-proof: If you are against smart growth, what are you for... dumb growth?

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. Occasionally, groups make the mistake of continuing to fortify and amplify a losing debate. Groups keep thinking that with one more report or one more fact sheet the tide will turn and people will start to embrace their position. Sometimes this just isn't the way to talk about an issue. You tried it and now need to cut your losses. By changing the frame, you can create space for a new, more productive conversation. But remember that reframing is often an uphill battle – it takes a lot of time and money, consensus among many organizations and spokespeople, and patience. People like the president of the United States might – but not always – be able to reframe an issue more quickly and easily because their sphere of influence is so great. But for most groups, reframing requires a multi-year commitment.

For many years, gun safety advocates advanced new policies limiting the sale and possession of weapons with a "guns kill" frame. But for gun-rights groups, this was a losing frame. So they executed a very successful reframe by shifting the conversation from "guns kill people" to "people kill people," a frame that emphasizes individual responsibility. This was a gradual shift that took several years and significant communications investment from powerful organizations like the National Rifle Association and others.

STOP: Go to the chart and complete Step Two by filling in your internal and external scans and determining your position.

STEP THREE: STRATEGIC CHOICES



Now you must decide who your target audiences are and 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 who own a truck; 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. How you reach each different audience will be dramatically 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 audience. (You'll note the attached Smart Chart 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, both the decision maker and the target audience would be smokers, as 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 select voters in a key council district who can help persuade their elected council member to vote yes. The focus is on the audience(s) with the greatest influence over and access to the decision maker. Think about this in your strategy: if your objective hinges on a decision maker with whom you have little access or influence, you must rely on a well-chosen target audience to help you persuade that decision maker, since you aren't well-poised to appeal to them directly.

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. It will also be impossible to find generic messages that resonate with everyone. The result will be watered-down messages that don't move a soul, particularly in today's crowded marketplace of ideas. You must target a specific, definable audience.

The media is not a target audience. Media outreach is generally a means to an end – a tactic to reach other audiences. You can list media relations activities in Step Four.

The target audience is likely smaller than you think. When it comes to moving an issue, there is no pre-determined 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 right audience to help you achieve your objective. The smaller the target audience, the easier it is to create focused communications that will move the audience to action.

Audiences that serve as a social reference group on the issue – the people other people look to when forming their opinions – can often be a good target. For example, when Human Rights First wanted to persuade the Bush administration to set clearer policies on interrogation of terror suspects in military custody, it selected retired military leaders as a key audience to activate on the issue, since many Americans defer to this group on military policy based on their experience and trusted positions of leadership. Targeting audiences that are likely to bring along others is a smart way to communicate with a small number of people but end up with large numbers of supporters. Also, select audiences that are willing to publicly show their support. Whether it's posting a bumper sticker on their car or wearing a t-shirt, public proclamations are incredibly important to building the perception of broad support for – and in turn attracting others to – your issue.

Finally, focus on those you can persuade. It might seem obvious, but too many organizations are seduced into answering their opposition instead of targeting audiences that might be on the fence, but would support their issue with a little thoughtful outreach.

2 READINESS

Start to 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 your communications in stages – sharing knowledge, building will and reinforcing action.

- Stage 1: Sharing knowledge. People need basic knowledge on the issue before they can even consider acting on it. In this stage, the task is to share information on the issue without overwhelming the audience. You want to help the audience develop a personal connection to the issue so they care – make the issue relevant by appealing to their values and lifestyle, or by connecting the issue to their family, friends or community. With your information, you also want to share empowering solutions, so people feel they can help make a difference.

- Stage 2: Building will. Building the will to act means overcoming the barriers your audience may have. In this stage, you are no longer sharing information. Instead, the task is to ease the 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 show them a leader taking action first, or position the action as the social norm. You must offer hope for positive change, and show that the benefits of taking action outweigh the risks. Position your audience as the hero – not the villain – who can take action to make a difference.

- Stage 3: Reinforcing action. Once people have taken action – even a small one – on behalf of your issue, reward them for doing the right thing. Remind them that they've done a good thing, and they'll be much more likely to act on your behalf again next time you ask. In this stage, the task is to celebrate your victories with the people who helped make them happen.

(For more information on these stages of persuasion, see the full Activation Point report at www.activationpoint.org.)

3 CORE CONCERNS

As you continue to think about your issue from the perspective of your target audience, the next step is to figure out what will compel the audience to move toward your objective. What do they already believe about the issue? You must be respectful of their thoughts and opinions on the issue. And you can 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 packaged in a way that aligns with their values.

Remember: This 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 provide them enough cargo space. An effort to get people to switch to low-emissions cars must address these concerns. If you want to connect with your target audience and make them your ally, you need to understand how they think and determine what lens they use to make decisions. It is always easier to tap into a value someone already holds than to create a new one.

For example, The Justice Project works to reform the death penalty system. Its policy objective is: Reduce mistakes in the death penalty system by providing DNA testing and qualified counsel. Its target audience is federal policymakers – specifically members of the House and Senate judiciary committees – who can help reach its objective.

The Justice Project needed to find a way to persuade key policymakers to side with it on an upcoming vote. Research showed that neither the economic argument (execution costs more than lifetime imprisonment) nor race statistics (minorities are more likely to receive the death penalty) were compelling enough to sway their audience.

The Justice Project found that the best way to persuade its target audience was to focus on innocence. The majority of its target audience agreed innocent people should not be sentenced to death. Armed with statistics showing an increasing number of people being exonerated from death row, the Justice Project was able to appeal to a value its audience already had (it is wrong to kill innocent people) and start a conversation about how to keep wrongful convictions from happening. And at that point, reform became possible.

Tap into your audience's existing concerns to help make the issue personal to them. Take it from these focus group respondents:

- "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 your life and the people you 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 a long and varied list 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 zone – understanding the risks and rewards your audience associates with your issue can help you have a much more productive conversation.

Consider the lifestyle of your audience. The best way to make it easy for audiences to engage with your issue is to ensure it fits with their lifestyle. For example, the annual Race for the Cure attracts hundreds of thousands of people who get up early to run a race to raise money to cure breast cancer. But there are plenty of people who will never get out bed at the crack of dawn on Saturday to run a race. For those people, the Susan G. Komen Foundation offers an option more in line with their lifestyle: Sleep in for the Cure. Participants still pay the registration fee that benefits the charity, and receive a t-shirt to honor their participation, which they can proudly wear as they support the cause from under the covers.

You may identify numerous persuasion possibilities. Once you've made your list, review your objective and target audience, as well as your internal and external scans, and then decide on the concern to tap and the barrier you'll need to overcome. Make the choice of which concern to tap based on what will be the most motivating to the audience, and what you can legitimately link your issue to – if it seems like a stretch, rethink your choice. If you've identified multiple barriers that might prevent your audience from engaging, choose the deal breaker – one that's most important to overcome to keep them in the conversation.

4 THEME

Theme is the big picture you want to convey to the audience on the issue—it defines how you'll approach the conversation with your audiences.

In anti-smoking campaigns, a number of themes have been used to reach different audience segments with different values. One makes big tobacco THE BAD GUY. The Truth campaign does this by showing kids how they are being manipulated by big tobacco. The Campaign for Tobacco Free Kids also used this theme, exposing tobacco companies' marketing plans to make cigarettes appealing to kids.

Another approach is to VILIFY SECOND-HAND SMOKE. Gasp.org is very aggressive and runs creative campaigns that say, "Smoking hurts babies," and, "You smoke, I choke." Breathing Space's Take It Outside campaign is softer and asks parents to protect their children, and if not stop smoking altogether, at least take it outside so as not to expose the child.

A third approach is to focus on how smoking makes teens LESS ATTRACTIVE. Smoking is Ugly is an effort by Christy Turlington to show teens how ugly smoking makes them look. A number of teen Internet sites highlight statistics that show teen smoking makes you smell, is grosser than picking your nose, and gives you bad skin and bad breath.

Three different themes: make tobacco the bad guy, vilify second-hand smoke, and show how smoking makes you less attractive. Different themes to reach different audiences toward the same objective of reducing smoking, with each theme dictating very different messages and messengers. The key is to select a theme that springs from the audience's values, not yours.

Consider the tone as well. An optimistic tone can help empower and motivate your audience. Hope is also an incredibly powerful incentive for a person to engage with your organization – a sense of hope, of possibility, enhances a person's desire to help.

And remember, different themes might emerge from the same value. For example, the Smoking is Ugly campaign featured a model to appeal to teen girls on their value of looking attractive. That value could have been approached in a number of ways, each one prompting different themes. For a positive-toned theme on the same value, one ad stated "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 three efforts appeal to the same value, with slightly different themes. The key is to figure which theme will work best for your audience. And once you pick a theme, you must stick with the same theme throughout your communications efforts.

5 MESSAGE

By now you know who 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 above. Keep in mind these words of wisdom: "It's not what you want to tell them, it's what they can hear."

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

- Is it based on the audience's core concerns?
- Do you 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 in your messages.

For an anti-litter effort in Texas, campaigners targeted young men who didn't really care about the environment or littering – but did carry enormous pride when it came to the Lone Star 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, and was ultimately an enormously successful effort.

A message is not a re-worded mission statement.

6 MESSENGER

Who delivers your message is just as important as what you choose to say. The right message delivered by a messenger with no credibility with your target audience will likely fall on deaf ears. For the Give Swordfish a Break campaign – aimed at securing a swordfish recovery plan to help plummeting stocks – organizers determined that environmentalists alone were not the most effective option for reaching decision makers within the federal government or for activating a new segment of the public to stop consuming unsustainably harvested fish.

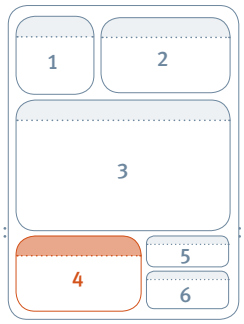
Through research, organizers found that seafood consumers listen to and trust food purveyors – and especially chefs – with information about what they should or should not eat. Similarly, chefs had strong credibility with government decision makers as a new voice of expertise in the debate because many could report from firsthand experience that the size of swordfish at docks and fish markets had declined over the years. Chefs had the credibility the effort needed. They resonated with the target audiences and became highly effective spokespeople. Environmentalists alone could not have delivered the same message and had the same impact.

People listen to people more than institutions. According to the 2006 Edelman Trust Barometer survey, 68 percent of US opinion leaders trust "a person like me" as the most credible source of information.

"The lack of trust in established institutions and figures of authority has motivated people to trust their peers as the best source of information." – Richard Edelman, president and CEO, Edelman, a public relations firm.

STOP: Go to the chart and complete Step Three by filling in each of your strategic decisions. Be sure to give each decision a reality check using the tips provided.

STEP FOUR: COMMUNICATIONS ACTIVITIES



In this section, your communications 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: Once you've made all the preceding strategic communications decisions, then you can pick the communications tactics that will work best. These need to take into account your objective, internal and external scans, audience target, and message. The communications tactics are how you carry the chosen message to the chosen audience. Tactics can include meetings, Web sites, newsletters, a press conference, letters, phone calls, paid advertising, or other means for getting your message out to your audience.

The best communications efforts use the most direct tactics possible. For example, you shouldn't bother with a full-scale advertising campaign to reach your organization's members when you can reach them directly through a newsletter or email appeal. The tactics should also be appropriately chosen for your target audience. For example, using Facebook or MySpace to reach teens is a great idea, but using those Web sites to reach seniors is not. Your tactics should always be in line with your objective, and they should match the theme and tone you've chosen for your communications.

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

Timeline: Now that you've determined the activities in your communications strategy, begin to plot out the timing. Be sure to note natural communications opportunities when your audiences are more likely to be attuned to and act on the issue, like back to school or breast cancer awareness month. Then 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 on the issue. 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.

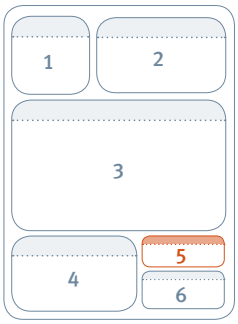
Consider other organizational commitments like board meetings and big fundraisers to ensure your communications effort gets the attention and focus it needs. Begin to integrate your communications strategy into your overall work plan.

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

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

STOP: Go to the chart and 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:
MEASUREMENTS OF SUCCESS

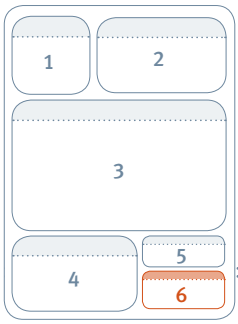


As you implement your strategy, you'll want to monitor your progress along the way. Identifying both quantifiable and anecdotal ways to measure success helps you signal progress throughout your efforts to internal audiences like staff and volunteers and to external audiences like funders and policymakers.

The measures can be a mix of outputs and outcomes. Think of outputs as measures of your efforts, the things you are doing to move your strategy forward. Outcomes are the changes that occur because of these outputs. One output might be generating more news articles carrying your key messages in outlets that reach your target audience. One outcome might be that your target audience saw the news coverage and, based on the coverage, invited your organization to testify at an upcoming hearing or stopped purchasing unsustainable products.

Measurements need to be defined and reviewed throughout the communications program. Don't wait until the end. The whole point is to make sure you are getting your messages to the right audiences and getting those audiences to do what you want. If this isn't working, you need to know ASAP so you can save time and money by revising and refining your strategy. Revision is a reality of communications efforts. Don't be afraid to review and reconfigure your efforts. This is smart to do, and charting measurements of success can 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.

- ☐ Is the strategy doable?
- ☐ Are your resources in line with your strategy? Does your internal and external scan support the decisions you've made?
- ☐ Are you motivating the right people to take the right action at the right time?
- ☐ 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, support this theme, tap into these values, move this target audience, etc. Does the logic work as well in reverse as it did when you worked through the chart? If not, go back and address trouble spots.)
- ☐ 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, etc.?
- ☐ Are there any assumptions or guesses built into the plan that require further research to confirm or correct?
- ☐ Is there buy-in from your organization to implement the plan?
- ☐ Are there other objectives you need to Smart Chart to ensure you're taking a comprehensive approach to meet your overall goals? Several Smart Charts can combine together to help you craft your overall communications plan.
- ☐ 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 this screen whenever you update or adjust your strategy. You can also tailor this list based on your communications strategy and use it to assess tactical ideas as they are presented.

STOP: Go to the chart to 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 communications effort by using the Smart Chart 3.0. You can also use the 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 communications to educate segments of the public as well as policymakers. You should be clear that communications efforts that involve specific legislation could constitute lobbying and must be accounted for according to lobbying laws that govern 501(c)(3) activity. The examples in this guide are only to illustrate points and are not intended to advocate for specific legislation.

The Smart Chart was created for the Communications Leadership Institute by Spitfire Strategies.

Spitfire Strategies provides strategic communications 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 the Smart Chart, visit our Web site at www.spitfirestrategies.com.

The Communications Leadership Institute (CLI) is a nonprofit organization dedicated to providing nonprofits with the training and tools they need to increase their communications capacity and use high-impact communications campaigns to achieve their goals. CLI offers the gold standard in communications training so nonprofits can use their voices in the most powerful way possible. For more information, visit www.communicationsleadership.org.

Spitfire Strategies and CLI wish to thank the many people who helped bring this publication to life.

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1 → 2 → 3 → 4 → 5 → 6 → **SMART CHART 3.0**

1 STEP ONE: Program Decisions

Broad Goal: What do you want to achieve over the long term?

Objective: What's the first measurable step you need to accomplish within the next 12 months to move toward your goal?

Decision Maker: Who can make your objective a reality by taking a specific action or changing a specific behavior?

2 STEP TWO: Context

Internal Scan: What are your organization's assets and challenges that may impact your outreach strategy (budget, staffing skills, resources, reputation, etc.)?

Assets:

Challenges:

External Scan: What is already happening outside your organization that may impact your strategy (e.g., timing of the issue or events, activities of other organizations in this space, barriers audiences may face to taking action, other potential obstacles or opportunities)?

Assets:

Challenges:

Define Your Position: Do you need a plan that will frame, fortify and amplify or reframe the debate?

☐ Frame (no one is talking about your issue)
☐ Fortify and Amplify (you like the direction the debate is headed and want to push it further)
☐ Reframe (you want to change the discussion about your issue)

3 STEP THREE: Strategic Choices

Decisions to Make	Audience 1	Audience 2	Audience 3	Reality Check
Audience Target: Who must you reach to achieve your objective? (There's room to describe three audiences here. You may not have that many or you may have more.)				Who can most help you achieve your objective? Who can you persuade? Think small – segment your audiences as much as possible. This is not the general public. Your audience may be your decision maker, or it may be people who can help influence your decision maker.
Readiness: Where is your audience on your issue? Are they ready for what you want to tell them?	☐ Stage 1: Sharing Knowledge ☐ Stage 2: Building Will ☐ Stage 3: Reinforcing Action	☐ Stage 1: Sharing Knowledge ☐ Stage 2: Building Will ☐ Stage 3: Reinforcing Action	☐ Stage 1: Sharing Knowledge ☐ Stage 2: Building Will ☐ Stage 3: Reinforcing Action	If they don't yet know about, care about and believe in your issue, check Stage 1. If they know, care and believe – but aren't ready to act – check Stage 2. If they've already taken action and are ready for the next steps, check Stage 3.
Core Concerns: What existing belief or value can you tap into to engage and resonate with your audience? What existing belief might be a barrier you have to overcome?	Value: Barrier:	Value: Barrier:	Value: Barrier:	What does the audience believe? Where's their comfort zone? Note lifestyle considerations (e.g., to get parents to an evening meeting, you may need to provide childcare). Understanding these factors will help you make the issue personally relevant for the audience.
Theme: Your theme will guide solid messaging that reaches your audience and reinforces the core concern you want to tap. For example, if your audience's core concern is their pocketbooks, your theme might be "we can't afford not to invest."				Select a theme that matches the audience's values, not your own. Offer hope for change. Consider the emotion you want to evoke and the tone you want to strike. Happy, mad, excited and hopeful are all motivating emotions while emotions like guilt, shame or fear tend to be disempowering.
Message: What key points do you want to make with each target audience?	See reverse side of this chart to fill out your message boxes	See reverse side of this chart to fill out your message boxes	See reverse side of this chart to fill out your message boxes	Make sure your messages: • Are based on the audience's core concerns; • Overcome – rather than reinforce – their barrier; • Have an ask that is in their comfort zone (or offers a benefit that outweighs the risk); • Emphasize reward and convey hope toward success; and • Are consistent with your chosen theme.
Messengers: Who will best connect with the audience? Who is their social reference group on your issue? Can you show them a trusted leader taking action?				People listen to people, not institutions. Make sure your messenger is credible. The right message delivered by the wrong messenger may fall on deaf ears.

4 STEP FOUR: Communications Activities

Tactics: What activities will you use to deliver your messages to your target audience(s) (e.g., meetings, Web sites, newsletters, press events, letters, phone calls, paid advertising)? Don't forget to consider organizational capacity.	**Timeline:** When will you implement each tactic? Note key dates, deadlines and events. Be realistic – you can't communicate with audiences 24/7. Note natural opportunities when your audience is most likely to be attuned to and act on the issue. Plan ahead for the unexpected – sometimes events beyond your control can be a chance to connect with your audiences. Use a timeline to plot out all the steps that go into each tactic listed.	**Assignments:** Who will implement each activity noted in the timeline?	**Budget:** How much time and money will you spend on each tactic? Be realistic about what you can accomplish given available resources.
Audience 1: Tactics:			
Audience 2: Tactics:			
Audience 3: Tactics:			

5 STEP FIVE: Measurements of Success

Outputs: What will you produce to reach your objective (e.g., emails sent, events planned, phone calls made)?

Outcomes: What is the result of your outputs that demonstrates incremental progress toward your objective (e.g., increased donations, positive editorial, new members)?

6 STEP SIX: Final Reality Check

Before you put your chart into action, test for accuracy by asking yourself the following questions:

☐ Is the strategy doable?
☐ Are your resources in line with your strategy? Does your internal and external scan support the decisions you've made?
☐ Are you motivating the right people to take the right action at the right time?
☐ 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, support this theme, tap into these values, move this target audience, etc. Does the logic work as well in reverse as it did when you worked through the chart? If not, go back and address trouble spots.)
☐ 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, etc.?
☐ Are there any assumptions or guesses built into the plan that require further research to confirm or correct?
☐ Is there buy-in from your organization to implement the plan?
☐ Are there other objectives you need to Smart Chart to ensure you're taking a comprehensive approach to meet your overall goals?
☐ Can you measure progress?

If you answered no to any of these questions, go back and work through your choices again. And remember, you may have other objectives you need to Smart Chart separately to ensure you're taking a comprehensive approach to meet your overall goals.

To access the Smart Chart 3.0 Communications planning tool, turn page and fold down.

1 MESSAGE BOX

Audience 1: **Value:** **Barrier:**

Tap Value

Echo Vision

Overcome the Barrier

Ask

2 MESSAGE BOX

Audience 2: **Value:** **Barrier:**

Tap Value

Echo Vision

Overcome the Barrier

Ask

3 MESSAGE BOX

Audience 3: **Value:** **Barrier:**

Tap Value

Echo Vision

Overcome the Barrier

Ask