



THE SPITFIRE STRATEGIES SMART CHART 2.0

A New and Improved Tool to Help Nonprofits Make Smart Communications Choices



THE SPITFIRE STRATEGIES 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 2.0 will help you assess your strategic decisions to ensure that your communications plan delivers high impact.

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

Fight the urge to think tactically in the beginning. Strategic decisions must be made before you choose tactics such as holding a press conference or launching a website. Remember: In a good communications plan, strategy drives tactics – not the other way around.

For those familiar with Smart Chart 1.0, read through the box below to learn what's new in version 2.0.



Our best advice:
Think inside the box

What's New?

At the center of this document, you will find Smart Chart 2.0 – a new and improved 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, you'll be asked to stop and fill in sections of the chart along the way. If you follow all the steps – in order – you will end up with a solid communications strategy.

For big fans of Smart Chart 1.0, don't panic. We made only slight modifications. Section 2 has been revised and is now called Context. This section outlines the Internal and External Scans, which both have tremendous influence on your communications. There are also two new sections: Communications Objectives and Tactics. These help connect the final dots between planning and implementation. And, for strategic choices, we dropped the choices and rationale boxes. However, you should still consider all your options and then make good choices, each with a strong rationale (and, no, flipping coins still doesn't count!).

If you cannot part with the old version, that's okay. It is thorough and will help you get good results. We believe the improvements in Smart Chart 2.0 can make your communications reach and impact even more effective. However, despite the new look, 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 2.0 (or the original Smart Chart) log on to www.SpitfireStrategies.com.

→ Getting Started

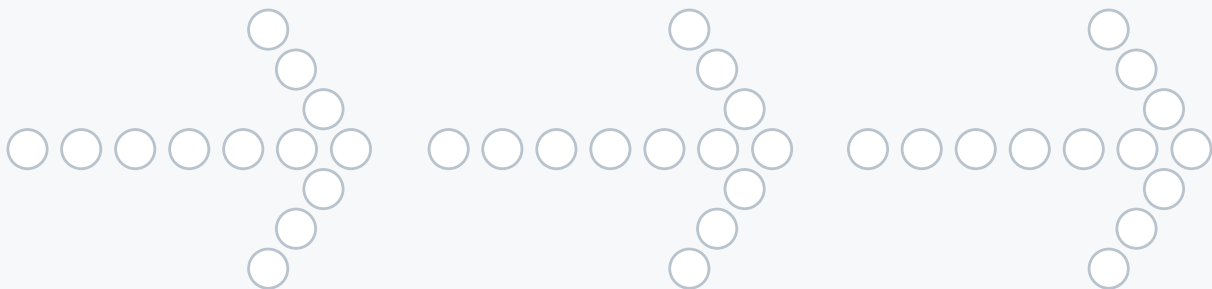
This process is not rocket science, but it requires time, commitment and focus to complete it successfully. Building consensus among campaign partners around the decisions you need to make is not always easy. But it is necessary. Abdicating decisions will lead to less effective communications.

The chart features five major strategic decision sections:

1. Program Decisions
2. Context (Internal and External Scans)
3. Strategic Choices (Audience, Message and Messenger)
4. Communications Objectives
5. Tactics

Go in order to make the most of your strategic decisions – 1-2-3-4-5. For instance, you must set your goal before you select a decision maker. If you don't have a goal, how will you know who ultimately will make the decision that helps you achieve it? 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.

Make sure you have a good rationale for each of your decisions. If you are using a big assumption to make the decision, really examine it to ensure your plan won't fall apart because of a bad assumption. 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 goal, decision maker, and measurements of success. Communications planning CANNOT happen before these program or campaign decisions are made. So before you look at communications, you must write down your three guiding points.

The Three Guiding Points – GOAL, DECISION MAKER, MEASUREMENTS OF SUCCESS

Lewis Carroll said, “If you don’t know where you are going, every road leads you there.” The good news is you do know where you are going. These three points are the navigational stars that will guide your strategic communications decisions and plans. 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? YOUR GOAL

A well-defined goal is THE MOST important component of a good plan. If the goal is too broad, the decisions made from this point on will be vague, virtually guaranteeing an ineffective campaign. Communications plans support an organizational mission, but there is a difference between mission and goal. Your goal is not your mission. Your goal is the next step in your overall plan for achieving your mission. This goal must be measurable and should represent a definitive plan of action.

Usually public awareness is not a goal in and of itself. It is a weigh station to changing behavior or to 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 campaign, 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 goal, and then decide how you are going to measure your progress toward this goal. “Stopping global climate change” or “saving the children” are certainly worthy aspirations, but they are missions, not goals. “Reducing auto emissions by 5 percent” or “providing quality health care to all children” are achievable goals.

Generally, goals can be divided into two categories: behavior change and policy change (which can mean government or corporate policy). These are two dramatically different goal types. Your organization may choose to pursue both types as part of a campaign. If that is the case, you should develop a separate plan for each goal since it is very likely that the decision makers, audiences, and messages for each type will be quite different. It is fine to have different plans as long as they do not contradict each other.

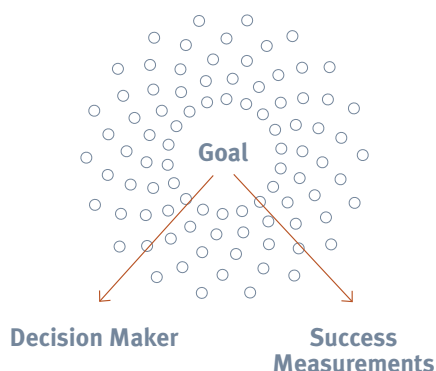
Mission	Goal
Save the children	Every child has access to quality health care
Save the environment	Reduce auto emissions by 5 percent
End foodborne illnesses	Establish a single federal agency that oversees food safety
End cervical cancer	Get the top 200 best companies for women to distribute educational materials to their employees about screening
Abolish the death penalty	Provide DNA testing to every person accused of murder

2

Who makes your goal a reality?

DECISION MAKERS

1. Make Program Decisions



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. If your goal is to change behavior, the decision maker may be a specific consumer group (i.e., coffee drinkers may be the decision maker in a campaign to promote fair-trade-labeled coffee). If your goal 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 goal 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 if you will reach them through the 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 then figure out how best to get to them.

3

How do you know what you are doing is working?

MEASUREMENTS OF SUCCESS

A good way to make sure that your goal is specific enough and actually achievable is to chart how you will measure your progress. Identify both quantifiable and anecdotal ways to measure success. This can be a mix of outputs and outcomes. Think of outputs as services or products delivered. Outcomes are the changes that occur because of these outputs – perhaps in knowledge, behavior, or policy. 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 (if you have a policy goal) or purchased products you are promoting (if you have a behavior goal).

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. Revision is a reality of communications efforts. Don't be afraid to review and reconfigure campaigns. This is smart to do, and charting measurements of success can help.

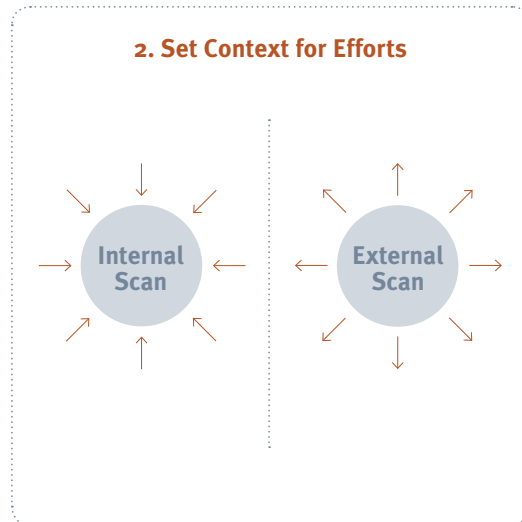
STOP: Go to the chart and complete Step One by filling in your goal, decision maker and measurements of success in the boxes provided.



No "silver-bullet" goal setting.



STEP TWO: CONTEXT: THE INTERNAL AND EXTERNAL SCANS



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? Are you well-known or are you little-known? Do you have lots of competition or no competition?

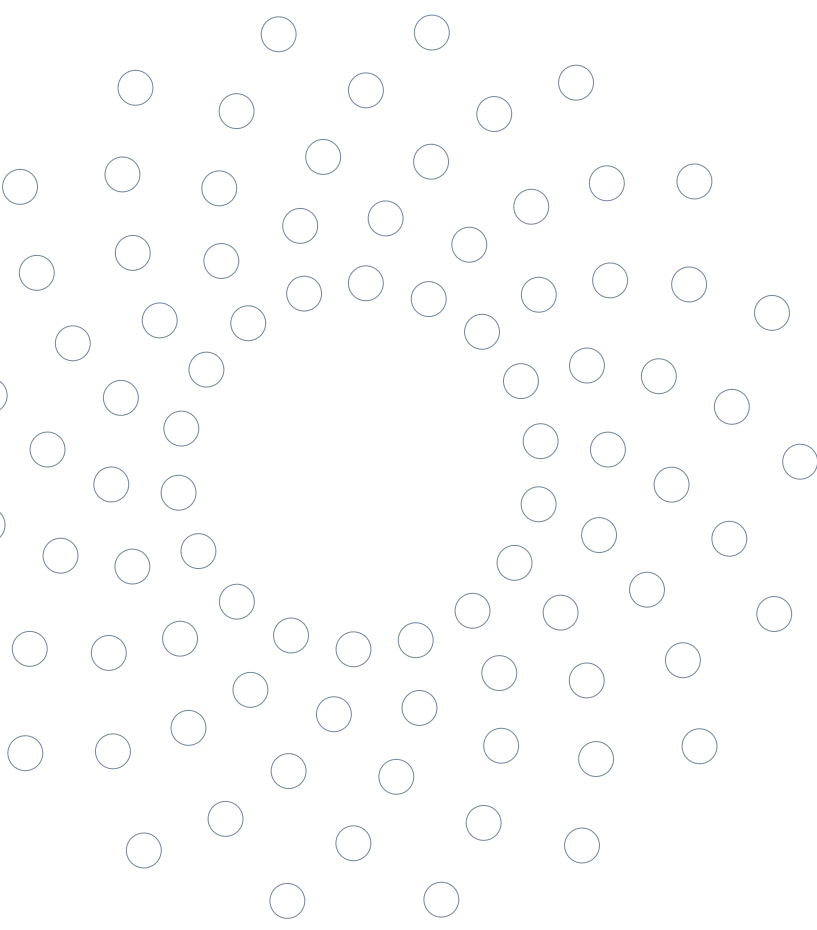


Remember, your target audience already has its own thoughts, opinions and misperceptions about your issue.

External Scan

As important, if not more important, is the external scan. Most groups start a communications effort as if no one has ever discussed the issue before. This is generally not true. Usually, there are known facts, misperceptions, players, opposition, and a debate already set up about any issue. You need to understand what, if any, debate is already going on to then decide if you are going to: a) leap in, b) frame the debate because it truly isn't happening, or c) reframe the debate because it isn't currently set up in a way for your organization to win.

Important: The external scan is not about "exposing the truth." It is about understanding 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. How is the media covering the issue? Consider all this information, then decide whether you need to leap in, frame or reframe the debate.



Possible Debate Positions:
Where is your organization?

Position 1: Fortify and amplify. This is where the debate has already been set. You are okay with the terms and are going to leap in and spend the majority of your efforts promoting your position. This means heavy implementation. Usually you are discussing the best tactics in a widespread way, e.g., media relations, ads, materials, speeches, etc.

Position 2: Frame. This is a position organizations are actually infrequently in, but one they assume they are in when planning. Getting to frame a debate means that the debate isn't happening at all yet. You have a blank slate to develop and set up a debate. There aren't a lot of misperceptions because there isn't yet a lot of knowledge. Activities usually involved in framing a debate include research, language development, messaging, audience research and opposition planning. For implementation, it usually means agenda-setting tactics, such as one key news article that explains the position or one key speech in front of important stakeholders who might echo the message. Once you have framed successfully, you move to Position 1 to fortify and amplify.

Position 3: Re-frame. This is a position groups are in far more often than they think. Sometimes groups actually continue to fortify and amplify a losing debate. Groups keep thinking that with one more report or one more fact 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. How can you talk about the issue in a new way to get better traction and make progress? Figuring this out means utilizing some of the same activities in Position 2, such as research and messaging. It also usually means doubling back with allies to make the case about a new way to talk about the issue. You don't want friendly fire to doom your new effort. Then continue with framing implementation activities - like agenda-setting articles, opinion pieces, and speeches - before going whole hog and amplifying the new you.

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

You need to 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 Decision One: AUDIENCE

There are two decisions to make here. The target(s) and the value you are going to tap into to resonate with the target(s).

Part One: The Target

The more clearly you define your audience, the more strategic you can be about reaching that audience. Audiences such as urban males under 25, suburban soccer moms, businessmen who travel frequently, or family farmers are well-defined. How you reach each of them is dramatically different. Thus, you can have several target audiences, but you should develop a different plan for each audience.



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 also will be impossible to find generic messages that resonate with everyone or compel everyone. The result will be watered-down messages that don't move a soul, particularly in a congested marketplace of ideas. You must target a specific, definable audience. For example, the Don't Mess with Texas campaign ultimately decided to target male Texans under 25.

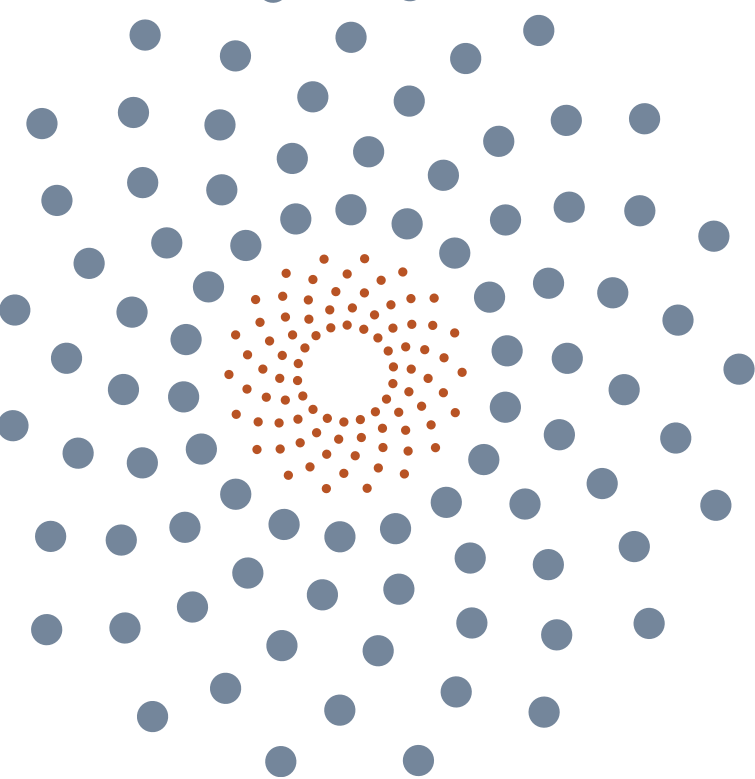
Part Two: Values and Core Concerns

With your target audience set, you need to figure out what will compel members of that audience to move toward your goal. What can you do to tap into one of their existing thoughts or beliefs to get them to support your ideas?

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. If you want to connect with your target audience and make it your ally, you need to understand how it thinks and determine what lens it uses to make decisions. It is always easier to tap into a value someone already holds than to create a new one.



Tap into your audience's existing values.



For example, The Justice Project works to reform the death penalty system. Its policy goal 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 goal.

The Justice Project needed to find a way to persuade the committee members to side with it. Research showed that neither the economic argument (execution costs more than life-time imprisonment) nor race statistics (minorities are more likely to receive the death penalty) were compelling enough to sway the audience. The moral argument – that it is wrong to kill innocent people – also failed to move people in the direction it wanted to go.

In the end, 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.

You may identify numerous persuasion possibilities. Once you've made your list, review your goal and target audience, as well as your internal and external scans, and then make your decision. Don't forget to consider your rationale: Know why you're making that decision.

3. Make Strategic Choices

- 1 Audience and Audience Value
- 2 Strategic Approach
- 3 Message and Messenger

2

Decision Two: STRATEGIC APPROACH

Strategic approach is frequently confused with tactics. The strategic approach is the big picture. Tactics are the lines you use to draw the picture.

Let's pretend your goal is to get your mother to call you more than your sister (a goal that can be measured by the number of phone calls you each receive from your mother in a given week, i.e., a behavior change). Your target audience is your mother. You know your mother can be persuaded if you tap into the fact that she's tired and needs some pampering. That's her core concern.

From a strategic standpoint, you can approach your mother in different ways. One strategic approach would be to provide extra help around the house. Here your tactics (which we'll discuss later on) might be weeding the garden, changing the sheets and dusting the furniture. Another strategic approach might be a smear campaign against your sister. Here your tactics are repeating all the mean things she has ever said about your mom and reminding your mom of all the trouble your sister has caused, leading to your mother's fatigued state.

You can see that the appropriate tactics are dramatically different for each strategic approach.

Now for a real world example. In the anti-smoking campaigns, a number of strategic approaches have been used. One approach is to make 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 exposed the 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." The Breathing Spaces Take It Outside campaign is softer and asks parents to protect their children, and rather than stop smoking altogether, at least take it outside so as not to expose the child.

A third approach has been to disregard health consequences of teen smoking and 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. Several teen Internet sites highlight statistics that show teen smoking makes you smell, is grosser than picking your nose, and gives you bad breath.

Three different strategic approaches: make tobacco the bad guy, vilify second-hand smoke, and show how smoking makes you less attractive. All might work. But each dictates very different messages and messengers.

You may have more than one level of decisions to make to fully determine your strategic approach. Looking at the death penalty example again, once reform advocates decided to focus on innocence, they needed to determine who or what to make responsible for the fact that innocent people were being wrongfully convicted – a person or "the system." They decided to go with the system because it was more consistent with their overall goal. Their rationale was that if people were to blame, those people could be replaced without changing the system. But, if they could show the system was broken, then they could push for system-wide reform.

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Decision Three: MESSAGE AND MESSENGER

Creating messages for your campaign requires two decision points. First, you need to figure out what the key messages are. Second, you need to determine who will deliver this message.

Part One: The Message

By now you know who you want to reach, how you might persuade them, and what strategic approach you will take. 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."



No MY-EYES-GLAZE-OVER words or phrases 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 carry enormous pride when it came to the Lone Star state. Keeping this value in mind, campaigners built messages that focused on 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 campaign.

Part Two: The 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 nor for activating a new segment of the public to pressure government.



People listen to people more than institutions.

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. The media – given an explosion of chef TV shows and the celebrity chef craze – also found chefs to be an interesting voice. Chefs had the credibility the campaign needed. They resonated with the target audience and became highly effective spokespeople. Environmentalists alone could not have delivered the same message and had the same impact.



A message is not a re-worded mission statement.

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 OBJECTIVES

Communications objectives are different from your organization or campaign goals. The communications objectives are the big “to dos” of the communications plan. These answer how you are going to get your message to your audience using your chosen approach. Look at the following example.

Goal: Pressure the Canadian government to adopt better protection measures for the Boreal Forest (you need to define what “better” means, of course).

Decision Maker: The Canadian government.

Measurements of Success: Strong showing of American support for this action, largely from the target audience: American businesses that source products from the Boreal Forest.

Strategic Approach: Remind American businesses that their consumers don’t want them sourcing products that are deemed environmentally unfriendly and destructive to important ecological areas. Give them a chance to adopt a Boreal-free policy before you start educating consumers, so they can seem like the good guys.

The Message: A Boreal-free policy is good for the company bottom line, and echoes the company values to environmentally-conscious customers.

The Messengers: Business leaders who adopt this stance early and can influence peers. Note: In this instance, while business leaders are an audience target, a select group of these leaders are “early adopters” who also serve as messengers.

4. Set Communications Objectives

How to get the message to the audience through the approach lens

The communications objectives are about getting the chosen message to the chosen audience using the approach that businesses who adopt a Boreal-free policy will be seen as the good guys and reap financial rewards. Sample objectives might include:

- Educate business leaders who do business in the Boreal about the environmental problems, since business leaders are a primary audience.
- Showcase to these business leaders the financial benefits other industries have experienced when taking proactive environmental stands.
- Also show them the cost benefit of not getting caught up in an environmental boycott.
- Recruit spokespeople who will be compelling to the primary audience, like the CEO of Staples who just committed to using more sustainable wood products for paper.

STOP: Go to the chart and complete Step Four by filling in your communications objectives.



STEP FIVE: 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 goal, internal and external scans, audience target, and message. Make sure your tactics match up to these decisions by asking yourself four key questions:

1. Who will the tactic reach?
(Should be your target audience.)
2. How does it support the goal?
(Remember to include both output and outcome expectations as described below.)
3. What is the anticipated output?
(Usually an activity that your organization controls.)
4. What is the anticipated outcome?
(Usually a consequence of an activity or action your organization implemented.)

If you can't easily answer these questions, rethink the tactic. This isn't a one-time tactic check. Run every tactic you are considering through this list of questions. You may even want to tailor this list based on your communications plan and use it to judge tactical ideas as they are presented.

STOP: Go to the chart and fill in some possible tactics. Be sure to run each potential tactic through the screener questions. Only write down viable tactics. You can change or add tactics as your campaign moves forward.

5. Pick the Best Communications Tactics

For each, ask...

→ Who it Reaches

→ How it Supports Goal

→ Anticipated Output

→ Anticipated Outcome

Ready, Set, Go...

Now it's your turn. Evaluate an upcoming, current, or recent communications campaign by using the Smart Chart 2.0.

Important reminder: Make your choices in order as you follow the chart. Each decision you make will affect 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 goal 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.

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



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THE SPITFIRE STRATEGIES SMART CHART 2.0

1 STEP ONE: Program Decisions

Goal: What are you trying to do?

Decision Makers: Who makes your goal a reality?

Measurements of Success: How will you know what you are doing is working?

2 STEP TWO: Context

Internal Scan: What are the assets and challenges of your organization that may impact this plan?

External Scan: What is already happening outside your organization that may impact this plan?

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

3 STEP THREE: Strategic Choices

Decisions to Make	Your Decision	Reality Check
Audience Target: Who must you reach to achieve your goal?		Should not be general public or anything similar. Must be segmented. Should be the person/people who can most help you achieve your goal. Only when you figure out who this is, can you figure out how to reach them.
Values/Core Concerns: What existing beliefs can you tap into to reach your audience?		What do they believe? Did you answer these two questions before choosing your audience: what do they believe that you can tap into, & what do they believe that you have to overcome?
Approach: What is your overall strategy?		Do not go straight to tactics. Consider big strategic decisions first. These will dictate tactics.
Message: What key points do you want to make with your target audience?		Big difference between mission & message. Mission is what you are about. Message is about resonating with your audience based on their beliefs & values. Avoid MEGO phrases (my eyes glaze over).
Messengers: Who has the best chance of resonating with your target audience?		People listen to people, not institutions. This is about who your audience can hear, who is credible to them. Sometimes you can have the right message but the wrong messenger delivering it. Result: fewer people listening to what you have to say.

4 STEP FOUR: Communications Objectives

How are you going to get your message to your audience using your chosen approach?

5 STEP FIVE: Pick Your Tactics

Consider your goal, internal and external scans, target audience and message. Then answer the following questions.

1. Who will the tactic reach? (Should be your target audience.)
2. How does it support the goal?
3. What is the anticipated output?
4. What is the anticipated outcome?