

VII – Guide, Template and Forms

A. Demand Response Communications Plan 101

What Is a Communication Plan?

A communication plan is a tool that helps you organize and describe how you plan to use various communication mediums to communicate your message, position or point of view to one or more audiences that will help you accomplish a stated goal or objective.

Consider the following questions when developing a communications plan:

- What are your short-term and long-term objectives?
- What is your timeline for completion of the objectives?
- Who are your target audiences?
- What are the key messages you wish to communicate (no more than three, please)?
- What are your human and financial resources needed to conduct the campaigns?
- What materials and/or activities will best disseminate these messages?
- What communications mediums should you use/targeted?
- What specific roles have you identified for your spokespeople?
- What role will consortium members and staff play?
- How will you evaluate the effectiveness/success of your plan?

Communications mediums include all written, spoken and electronic interaction with target audiences and include but are not limited to:

- print publications
- online communications
- meeting and conference materials
- media relations and public relations materials
- marketing and sales tools
- legal and legislative documents
- incoming communications;
- committee and board communiqués
- corporate identity materials, including letterhead, logo, and envelopes
- annual reports
- signage
- speeches
- invoices

Steps to developing a communications plan include:

- 1. Determine Goals and Objectives**
- 2. Identify and Profile Audience**
- 3. Develop Messages (Story)**
- 4. Select Communication Channels**
- 5. Choose Activities and Materials**
- 6. Establish Partnerships**
- 7. Implementation Plan and Timeline**
- 8. Evaluate and Make Mid-Course Corrections**

B. Developing a Communications Plan

Getting Started

Take the following steps to start developing an effective communication plan:

Step 1: Determine Goal and Objectives

To initiate a successful and effective communications effort, start with an assessment of your current goals. Examine your organization — its mission, vision, values and beliefs and what it hopes to accomplish. This process will help narrow and sharpen the focus for your *communication initiative(s)*.

1. What issue(s) are most important to your organization right now?

2. What companies, groups, organizations or other entities are **MOST** directly affected by the issue(s) or accomplishment(s) stated above?

3. What companies, groups, organizations or entities make decisions about the issue?

4. What is the overall goal you want to achieve? What do you want to accomplish? (i.e., What change would you be able to observe if you accomplished your goal?) (Be specific.)

5. What tangible outcomes would you like to achieve through a communications effort? How will you know you are achieving your goals? (Be specific. What would you like to see, hear, or have in-hand that would let you know you are making progress toward the goal?)

Step 2: Identify and Profile the Audiences

Once you've identified your key issues, it's time to identify and profile specific audiences to target with a communications initiative. The reason for taking the time to look this closely at your audiences is that this kind of background information is essential in choosing the most effective ways to communicate with the audience.

2.A. Audience Definition Worksheet

- i. Of the audiences (companies, groups, organizations or entities) listed in the Step 1, whose knowledge, attitudes, actions and/or behavior **MUST** change in order for you to meet your goal? These groups become your **primary audience**)

- ii. Who are the other audiences (companies, groups, organizations or entities) listed in Step 1 that may be directly affected if you succeed in your goal? These groups become your **secondary audience**.

- iii. Are there any others audiences (companies, groups, organizations or entities) who can influence primary and secondary audiences? These groups become your **tertiary audience**. (*You may wish to design a communication initiative to reach some of these audiences as well. Or you may see a role for these folks as "allies and partners".*)

2.B. Audience Segmentation Worksheet

Now you are ready to complete worksheets for each of your audiences identified above. (Note: you will probably need to make multiple copies of this worksheet for each audience.)

Primary Audience(s) - (*Those entities whose knowledge, attitudes, actions and/or behavior **MUST** change in order for you to meet your goal*)

- i. Name the specific audience (company, group, organization or entity)

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- ii. Describe what you know about this audience's knowledge, attitudes, actions and/or behaviors as they relate to your issue:

 - iii. What are the specific barriers to this audience fully supporting or participating in reaching your goal?

 - iv. What are the benefits if they do?

 - v. What are the characteristics of this audience?

 - vi. What are the goals of this audience?

 - vii. What or who are they influenced by?

 - viii. What makes new information credible for them?

 - ix. What or who could motivate change or action?

 - x. Are there any language considerations?

2.C. Secondary Audience(s) (*Those entities who may be directly affected if you succeed in your goal*)

i. Name the specific audience (company, group, organization or entity)

ii. Describe what you know about this audience's knowledge, attitudes, actions and/or behaviors as they relate to your issue:

iii. What are the specific barriers to this audience fully supporting or participating in reaching your goal?

iv. What are the benefits if they do?

v. What are the characteristics of this audience?

vi. What are the goals of this audience?

vii. What or who are they influenced by?

viii. What makes new information credible for them?

ix. What or who could motivate change or action?

x. Are there any language considerations?

Step 3: Develop Messages

Message Worksheet (*one for each audience*)

3.A. Name the specific audience (company, group, organization or entity)

3.B. What are the barriers and benefits to your audience thinking, feeling, or acting on your issue?

3.C. What change(s) in **attitude** (the way they feel about the issue) do you want to motivate in your audience that will help you meet your goal?

3.D. What change(s) in the **behavior** (day-to-day actions) of your audience are you trying to achieve that will help you meet your goal?

3.E. Now, based on what you know your audience needs to hear in order to for them to think, feel or act in the way you want, what are the three most compelling sentences you could use to motivate the audience? These are your messages.

- i.

- ii.

- iii.

Step 4: Select Communication Channels

Communications channels carry the messages to the target audiences. Channels take many forms and there is an infinite list of possibilities. Answering some key questions will aid you in identifying the most effective channels for reaching your audiences.

Sample Channels include:

- Television stations
- Radio stations
- Newspapers
- Web sites
- Conferences
- Direct Mail
- Newsletters
- News Releases
- Magazines
- Industry publications

Channel Worksheet (*one worksheet for each audience*)

Note: Use the work you did in Step 2 to help you with these worksheets.

1. Name the specific audience (company, group, organization or entity)

2. Where or from whom does this audience get its information? Who or what do they find as credible sources of information?

3. Where are they most likely to give you their attention?

4. Complete list of channels your team can use to reach this audience:

Step 5: Choose Activities and Materials

Overview

What are the activities, events, and/or materials—to be used in your selected channels—that will most effectively and appropriately carry your message to the intended audiences?

In choosing these, you should consider:

- Appropriateness to audience, goal, and message
- Relevance to desired outcomes
- Timing
- Costs/Resources
- Climate of community toward the issue/activity
- Environment—geographic considerations

Sample Activities

- News conferences
- Editorial board meetings at newspapers
- Radio talk or call-in shows
- Web links
- Conferences
- One-on-one meetings
- Speeches
- Hotlines
- Listservs

Sample Materials to Support Activities

- News releases
- Fliers and brochures
- Opinion editorials (op-eds)
- Letters to the editor
- Public service announcements (PSAs)
- Video presentations
- Web pages
- Buttons, pins, and ribbons
- Promotional items and giveaways

Activities and Materials Worksheet *(Complete one worksheet for each channel)*

For each channel selected in Section 4, list the activities you intend to accomplish and the associated supporting materials you need to develop to conduct this activity.

Comm Channel	Activity	Supporting Materials
1	1	1 2
1	2	1 2
1	3	1 2
2	1	1 2
2	2	1 2
3	1	1 2

Step 6: Establish Partnerships

Other groups, organizations, businesses or entities may exist that would aid you in reaching your goal by providing funds, expertise, support, or other resources. Please list any allies or partners who might support or work with your audiences or who share in your goals.

Harnessing the Power of Partnerships

- *Identify Allies and Partners*
- *Determine Your Needs*
- *Identify Potential Partners*
- *Prioritize Your Contacts*
- *Make Your Proposal Strategic*
- *Face-to-Face Follow-up*

Step 7: Implement the Plan and Timeline

There are many tools for organizing yourself around time, dollars, and staff needed to implement an initiative. One approach is given here as an example. Of course you should feel free to use your own tried and true management tools.

Use the following steps to determine time, budget and staffing needs:

1. List all activities
2. Under each activity, outline the steps, in order, that will lead to its completion
3. Assign a budget estimate to each step
4. Assign a staffing needs estimate to each step
5. Working backwards from the activity completion point, assign a date for each step in the activity.

You can plot your dates on calendar pages if you'd like, or you can organize them in another timeline such as a Gantt chart (date/timeline runs horizontally across page; tasks are listed in chronological order down left-hand side. A line extends across the page from each task, showing the date work begins and ends on that task or subtask).

Channel	Activity	Mon1	Mon2	Mon3	Mon4	Mon5	Mon6	Mon7	Mon8	>>>>	Mon n	Budget
		X			X			X			X	
			X				X			X		
				X								
					X	X						
						X						

Step 8: Evaluate and Make Mid-Course Corrections

- Specify times to take stock of progress in completing communications plan.
- Determine strengths and weaknesses of the communications plan
- Identify obstacles to the communications plans success
- Create and implement new approaches for success.
- Develop revised Implement the Plan and Timeline Worksheet

C. Message Development

Your messages are closely tied to your goal and objectives. They deliver important information about the issue and compel the targeted audience(s) to think, feel, or act in a way that is supportive of you and your goals. Your messages can:

- Show the importance, urgency, or magnitude of the issue
- Show the relevance of the issue
- Put a “face” on the issue
- Be tied to specific audience values, beliefs, or interests of the audience
- Reflect an understanding of what would motivate the audience to think, feel, or act
- Be culturally relevant and sensitive
- Be Memorable

The messages you develop by using the worksheet provided in this section can be used in many ways.

- First, they are a set of statements that you and your team agree upon as conveying the key information for your initiative. They will not include all the detail and supporting ideas and data that you may use in printed materials or other forms of communication.
- The messages you develop in the worksheets can become the underlying themes for your materials and activities. You may develop slogans based on them. You may develop sets of talking points that members of your team will use in making presentations.
- They easily become the basis for radio and print PSAs, the genesis for posters, and may suggest topics for fact sheets, drop-in articles, and even letters to the editor or newspaper editorials.

Before turning to the Message Development Worksheet, take a few moments to read “Considerations for Message Construction.”

Considerations for Message Construction

Both the channel (the conduit for sending your message to the chosen target audience) and the purpose of communicating information influence message design. Information may be designed to convey new facts, alter attitudes, change behavior, or encourage participation in decision-making. Some of these purposes overlap; often they are progressive. That is, for persuasion to work, the public must first receive information, then understand it, believe it, agree with it, and then act upon it. Regardless of the purpose, messages must be developed with consideration of the desired outcome.

Factors that help determine public acceptance include:

Clarity—Messages must clearly convey information to assure the public’s understanding and to limit the changes for misunderstanding or inappropriate action. Clear messages contain as few technical/ scientific/ bureaucratic terms as possible, and eliminate information that the audience does not need in order to make necessary decisions (such as unnecessarily detailed explanations).

Readability tests can help determine the reading level required to understand drafted material and help writers to be conscientious about the selection of words and phrases.

Consistency—In an ideal world there would be specific consensus on the meaning of new findings, and all messages on a particular topic would be consistent. Unfortunately, consistency is sometimes elusive. Experts tend to interpret new data differently, making consensus among government, industry, and public interest groups difficult.

Main points—The main points should be stressed, repeated, and never hidden within less strategically important information.

Tone and appeal—A message should be reassuring, alarming, challenging, or straightforward, depending upon the desired impact and the target audience. Messages should also be truthful, honest and as complete as possible.

Credibility—The spokesperson and source of the information should be believable and trustworthy.

Public need—For a message to break through the “information clutter” of society, messages should be based on what the target audience perceives as most important to them, what they want to know, and not what is most important or most interesting to the originating agency. Prior to final production, messages should be pre-tested with the target audiences (and in some cases with channel “gatekeepers”) to assure public understanding and other intended responses.