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## WORKSHEETS FOR CREATING YOUR COMMUNICATION PLAN

### STEP ONE: ASSEMBLE YOUR TEAM

Review Video #3, called "Your Staff" in my video series called *Building Teams to Power Your Mission*.

Determine who best can help. Do you have marketing expertise on your board, staff, among your volunteers? Do you have people who are good ambassadors for your mission or who can make things happen?

#### TEAM

Name:

Title / Role / Expertise:

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## STEP TWO: DETERMINE BROAD GOAL(S)\*\*

Look at your vision, mission and who your nonprofit is serving.

What issue(s) is (are) most important to your nonprofit?

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Who is most affected by the issue / need?

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What is overall goal you want to achieve? What change would you be able to observe?

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What tangible outcomes would you like to achieve through a communications effort?

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\*\* Your broad goals are not the same as goals for specific campaigns. Examples of broad goals:

1. To be perceived as an energetic, dynamic, growing, inclusive, ethical leader in ...(your mission)
2. To fully engage targeted audiences in our mission by increasing our membership, volunteerism and donations.

### STEP THREE: ESTABLISH OBJECTIVES

Objectives must be **S**pecific  
**M**easurable  
**A**ttainable  
**R**ealistic  
**T**ime-bound

What do you want to achieve with your communication efforts? (For example, grow your list of email subscribers by (#) by (date), increase membership to (#) by (date), bring in 25% more new donors by (date), promote X, Y or Z service. And / or: change specific behavior or policy)

Goal #1 - Objectives:

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Goal #2 – Objectives:

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Goal #3 – Objectives:

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## STEP FOUR: UNDERSTAND YOUR CONTEXT

### Internal Scan

What staff, resources, and tools do you have to use when planning your communications?

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What about your reputation: are you already well known or little known? What partnerships can or should come into play?

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### External Scan:

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? 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? What obstacles or opportunities might you encounter along the way? Are there natural communication opportunities you can leverage to help advance your strategy?

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### Define Your Position:

Positioning Statement: Who is your organization and what benefits / solutions do you offer that are unique? What makes you different from the many other nonprofits out there who serve the same public? All of your messaging should reinforce this difference.

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## STEP FIVE: IDENTIFY AND PROFILE YOUR AUDIENCE\*\*

Using your answers from Step 2, think about whose knowledge, attitudes and behavior must be changed in order to meet your goals. Think about who is most affected by the issues / needs you are addressing.

Audience Segmentation Worksheet:

Audience #1:

Describe what you know about this audience's knowledge, values, attitudes, behaviors as they relate to your issue.

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Describe this audience's characteristics. How do they spend their time? What is their gender, ethnicity and income level? Education level? Language considerations? Who or what are they influenced by? What or who could motivate them to change or act?

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Core Concerns:

You must figure out what will compel the audience to move toward your objective. Tap into values they already hold. Identify barriers and lifestyle.

What are the barriers this audience has that might prevent your audience from hearing what you have to say or preventing them from acting?

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Are there lifestyle choices this audience makes that resonate with your issue or that don't?

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Are there key decision makers in this audience you may need to approach?

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Readiness:

People need basic knowledge on the issue before they can even consider acting on it.

What does your audience know about your vision, mission, population you serve, issues you address?

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Where or from whom does this audience like to get its information? Who do they find credible?

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Desired Action:

What do you want this audience to do?

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\*\*Answer the same questions for each audience.

## STEP SIX: DEVELOPE MESSAGE

Develop Messages:

Your messages are tied to your goals and objectives and compel the targeted audience to think, feel or act. Use these worksheets to develop a set of statements that your team agrees conveys the key information. The messages you develop in the worksheets can become the underlying themes for your materials. You can use the statements to develop talking points for making presentations, for printed materials, for social media, for emails, posters, fact sheets, etc.

Decide what to say:

"It's not what you want to tell them, it's what they can hear." For each audience, work through these stages:

Stage One: Are they ready to hear your message or do you need to begin by developing a personal connection by appealing to their values and lifestyle or by connecting the issue to their family, friends, community? See how you answered the Readiness question above.

Statements, stories to build connection:

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Stage Two: Build the will to act, feel, think by overcoming barriers, reducing risk, respecting comfort zone, fitting lifestyle, offering hope.

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Decide on your theme.

This is the big picture you want to convey to the audience on the issue. You can break down themes into categories like education, advocacy, fun, testimonials, impact. The key is to select a theme that springs from your audience's values and not your own. (Consider tone. Optimistic tone empowers and motivates audiences. Hope is powerful incentive, but see Message Tips). Stick with theme throughout specific communication effort.

Theme:

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Test your message:

- Is it based on the audience's core concerns?
- Do you overcome – not reinforce – their barriers?
- 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?

Try testing your message with a member of your target audience.

Stage Three: Once they have taken action, reward them with stewardship. Share victories.

Messenger:

Whoever delivers your message is just as important as what you choose to say. Messenger has to have credibility with your audience.

Who will deliver your message to each audience?

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## STEP SEVEN: DECIDE ON COMMUNICATIONS ACTIVITIES TACTICS, TIMELINE, ASSIGNMENTS & BUDGET

### Tactics:

How you carry the chosen message to the chosen audience. Tactics include your communication platforms: websites, blogs, emails, letters, social media, news articles, podcasts, etc. Keep in mind that some audiences won't use certain of your platforms.

Who are you trying to reach through each tactic?

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How frequently will you be messaging through each platform?

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### Timeline:

Use an organization wide calendar to plan for each activity and / or campaign. Create a social media calendar, separate from your main calendar.

### Assignments:

Assign key tasks to various people that are best positioned to implement your strategy. Use staff, board members, volunteers, partners.

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### Budget:

Plan for how time and money you will allocate for implementation of your strategy. Your budget should include any materials and / or services you may need to implement your plan. Examples might include printing brochures using an outside service, hiring an outside firm to help with message development or Facebook ads, cost of staff (allocating by percentage of time spent on communications), etc. Use your calendar to budget the time for each communication activity.

## STEP EIGHT: MEASUREMENTS OF SUCCESS

Here's where you measure the impact of all your communication efforts, both in terms of **intermediary benchmarks** (like the size of your Facebook following or email list) and **organizational objectives** (like total donations or total members).

What is your Baseline? (Where are you starting in terms of your social media community size, website traffic volume, total donors, total members, how many testified on your behalf?)

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What are your intermediary goals (every 3 months, type of growth?)

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What are your end goals (where will you be in 12 or 18 months?)

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What are the metrics you will use for each platform you are using?

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Strategy Review Meetings:

Schedule a strategy review meeting each quarter with your team to see what's working and what isn't. Explore the following:

- Which benchmarks have you met or exceeded?
- Which ones are elusive?
- What can you do to give the weaker ones a boost?
- What were your biggest successes? Why?
- Do you need to adjust and update your plan?