Technology as a tool to serve your clients

Session Worksheets

Marco Campana

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@marcopolis   marcocampana@gmail.com

DEFINING SUCCESS

SMART Goals: Specific, Measurable, Achievable, Realistic/Relevant & Time-based

Q: How will the world be different when our program/mission is implemented?

Q: What are our "SMART Goals" for our communications efforts? In other words, what are the concrete, measurable ways success in our communications, outreach, marketing or advocacy efforts will be realized? What are your own potential strategic objectives that can be supported by communications?

Objective	Measure	By (date)
1.		
2.		
3.		
4.		
5.		

SMART CRITERIA - EXPANDED

Specific

The criterion stresses the need for a specific goal rather than a more general one. This means the goal is clear and unambiguous; without vagaries and platitudes. To make goals specific, they must tell a team exactly what's expected, why it's important, who's involved, where it's going to happen and which attributes are important.

A specific goal will usually answer the five 'W' questions:

> What: What do I want to accomplish?
> Why: Specific reasons, purpose or benefits of accomplishing the goal.
> Who: Who is involved?
> Where: Identify a location.
> Which: Identify requirements and constraints.

Measurable

The second criterion stresses the need for concrete criteria for measuring progress toward the attainment of the goal. The thought behind this is that if a goal is not measurable it is not possible to know whether a team is making progress toward successful completion. Measuring progress is supposed to help a team stay on track, reach its target dates and experience the exhilaration of achievement that spurs it on to continued effort required to reach the ultimate goal.

A measurable goal will usually answer questions such as:

- How much?
- How many?
- How will I know when it is accomplished?
- Indicators should be quantifiable

Achievable

The third criterion stresses the importance of goals that are realistic and attainable. Whilst an attainable goal may stretch a team in order to achieve it, the goal is not extreme. That is, the goals are neither out of reach nor below standard performance, since these may be considered meaningless. When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities, skills and financial capacity to reach them. The theory states that an attainable goal may cause goal-setters to identify previously overlooked opportunities to bring themselves closer to the achievement of their goals.

An Achievable goal will usually answer the *How* question: How can the goal be accomplished?

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Realistic/Relevant

The fourth criterion stresses the importance of choosing goals that matter. A bank manager's goal to "Make 50 peanut butter and jelly sandwiches by 2pm" may be specific, measurable, attainable and time-bound but lacks relevance. Many times you will need support to accomplish a goal: resources, a champion voice, someone to knock down obstacles. Goals that are relevant to your boss, your team, your organization will receive that needed support.

Relevant goals (when met) drive the team, department and organization forward. A goal that supports or is in alignment with other goals would be considered a relevant goal.

A relevant goal can answer yes to these questions:

- Does this seem worthwhile?
- Is this the right time?
- Does this match our other efforts/needs?
- Are you the right person?
- Is it applicable in the current socio- economic- technical environment?

Time-based

The fifth criterion stresses the importance of grounding goals within a time-frame, giving them a target date. A commitment to a deadline helps a team focus their efforts on completion of the goal on or before the due date. This part of the SMART goal criteria is intended to prevent goals from being overtaken by the day-to-day crises that invariably arise in an organization. A time-bound goal is intended to establish a sense of urgency.

A time-bound goal will usually answer the question:

- When?
- What can I do six months from now?
- What can I do six weeks from now?
- What can I do today?

Paul J. Meyer describes the characteristics of S.M.A.R.T. goals in *Attitude is Everything*. (http://en.wikipedia.org/wiki/SMART_criteria)

CONTEXT: STRATEGIC QUESTIONS

(adapted from: A Strategic Framework from the Social Tech Training June 22-24 2008, at the MaRS Discovery Centre in Toronto)

The following questions, while seeming simple, should not be taken lightly – many can catalyze important organizational, operational, positioning, and strategic conversations about who your organization is at the core, who you serve, why your work is exceptional / why it matters, your key messages, new ways to "win" campaigns, and new ways of engaging your supporters and asking for help.

Through this process you will also ask specific questions about online goals, ideas, performance, and capabilities and solicit these from various perspectives inside your organization. This will give you a holistic view of the challenges and opportunities (sometimes the most holistic view that anyone in your organization has), and will also build support from other departments and people.

Key Questions to Answer:

- What are the **business** (financial, sustainability) **goals** of your organization? What are the **mission goals**?

- Does your organization have a **strategic plan**? What are the 5 most important priorities for your organization over the next 3 years?

- What does your organization do? **What is the "offering"** of services you provide? Try as much as possible to categorize and prioritize: no organization (business or non-profit) can be an expert at a dozen things; most are lucky if they can do one thing very well.

- Who do you serve? Who are your **target audiences** for your work? Again, categorize and prioritize, you can't speak to all people with any strength.

- How do your current communications efforts work for you? What **performance metrics** can you gather? (typical non-profit metrics include: website visits, time on site, key program / educational content viewed, donations, email list size and growth, events, site "members" if applicable, and engagement metrics)

- What does your communications need in order to do better? What are the **top 5 goals or ideas** it could have to be of better service to your organization or audiences.

- Do **others** inside your organization share the same goals and ideas on how communications can support their work? (this is where the Change Team comes in: gather their goals, concerns, and ideas)

- **Who else in the world** is doing great work that you admire? This could be in your space, or in a different industry (should be in the non-profit world, and an org with a similar scale/size to yours)

- How is your communications **team** performing? Do they (you) work well with other teams, helping them publish and brainstorm new outreach models, including via the web? Are they trained and equipped to do what needs to be done?

CONTEXT: SITUATIONAL ANALYSIS

Q: What is helping us/hindering us toward reaching our objectives (classic SWOT analysis)?

	Internal strengths	Internal Challenges
Resources eg. staff, volunteers, funding		
Infrastructure eg. on-line resources, systems, lists		
Skills, assets, passions eg. public speakers, social media savvy, writers, images		
Brand identity or positioning of organization /messenger		
	External opportunities	External threats
Mainstream media events, trends, reporters, editorial directions		
Social media – trends, opinion leaders, amount of coverage		
Public – broad levels of understanding/ engagement, attitudes		
Allies – who, communications assets, messages		
Opponents– who, communications assets, messages		

CONTEXT: KNOW YOUR AUDIENCE

Broader (nice to have)

Secondary (want)

Core (must have)
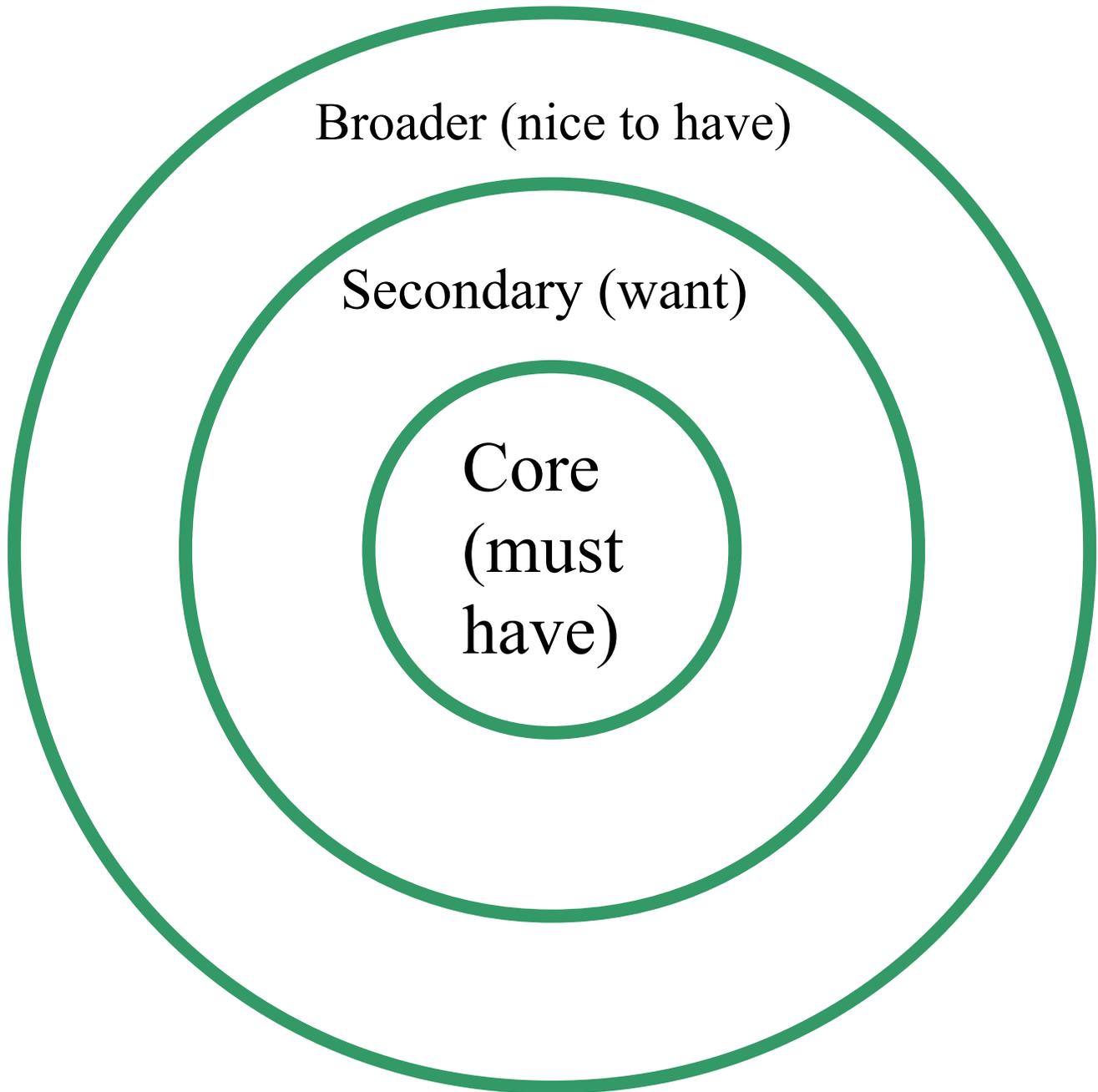
STAKEHOLDER ANALYSIS

Know your stakeholders and their expected reactions. Consider the people and organizations that have a stake in your initiative. Your stakeholder analysis should cover everyone who's truly affected by your initiative.

How you will manage them?

Questions to Ask

- What are the positions of each stakeholder on this initiative?

- How do you expect each stakeholder to react to what you're doing?
  - Look at your previous experiences with each stakeholder
  - Do you expect them to be outspoken?
  - Might they express their concerns privately or are they more likely to use the media?

- How might you use the support of those you expect to react positively?
  - Attendance at a potential media event?
  - Supportive quote in media materials?
  - Local angle on the announcement?

- How can you mitigate the concerns of those you expect to react negatively?
  - Can you brief them in advance?
  - Can you consult with them on what you're doing before announcing it widely?
  - How will you respond to their concerns if you can't mitigate them?

Be sure to identify potential negative reactions. If you know a person or group will react negatively to what you're doing, ignoring it is a bad idea.

You'll often find that for a given initiative, a small percentage of stakeholders will be highly supportive and a small percentage will be ardently critical. If you picture reactions on a continuum, they're the groups at either end. There's not much you can do to change their opinions. The stakeholders you want to influence make up the 80% in the middle.

(Adapted from: http://davefleet.com/2008/08/strategic-communications-planning-a-free-ebook)

AUDIENCE PROFILE

Audience	Core Audience	Secondary Audience	Broader Audience
Demographics: age; gender, ethno-cultural background, location, income, etc.			
Awareness/attitudes toward us, if any			
Values: What are THEIR values/motivators? What gets them off the couch?			
Call to Action: What do we want them to do, exactly?			
Benefits: What's in it for them? What do we offer them?			
Influencers/opinion leaders/messengers?			
Pathways: main sources of information? Eg. face-to-face, TV news, social media pathways			

AUDIENCE – PERSONAS

What do you know about your audience/members?

What additional research do you need to better understand your audience's social behavior or understanding/perceptions about your organization or issues?

Be more strategic in catering to each type of audience/member.

Internalize the audience/member that you are trying to serve.

Relate to them in terms of what they need.

(images from: http://blog.bufferapp.com/marketing-personas-beginners-guide)

Name
Job Title

- Where she works
- Details about her role

Demographics

- Age
- Gender
- Salary
- Location
- Education
- Family

Goals and Challenges

Values and Fears

Marketing Message

Elevator Pitch

Rachel
Small Business Owner

- Social Media Marketing
- Key decision-maker

Demographics

- Age 32-39
- Skews female
- $90,000/yr
- Urban location
- Master's degree
- Married, no kids

Goals and Challenges

- Save time online
- Find interesting content to share
- Maximize social media resources

How we can help

- Schedule posts to a queue
- Content suggestions

Values and Fears

Values dependability, clarity, good UI, fast support

Objects to pricing and poor value proposition during sales process

Marketing Message

Ultimate social media scheduling tool

Elevator Pitch

Use Buffer to schedule posts to your favorite social profiles. We'll even show you the best content to share, and you can add with one click.

MESSAGING - CRITERIA

SMALL GROUP ACTIVITY

Create the best welcome and ongoing engagement experience for a new client. Groups of 3 – discuss, map out, present.

Q: Thinking of our priority audience for communications, what do we want our messages to capture or avoid?

Criteria	Capture	Avoid
Tone/feel		
Their values		
Benefits		
Language/ words		
Images or icons		
Other (angles, stories…)		

OVERVIEW: TACTICAL APPROACHES AND TOOLS

(Via: WeAreMedia project http://bethemedia.wikispaces.com/Materials)

- What tactical approach are you considering for your organization? Why?

Approach	Questions
Listen	What decisions will you make based on your listening to? What key words will you use? How will you share or summarize what you learn from listening with others in your organization? How will you engage?
Participate	Who is empowered to respond and in what circumstances? How will you address negative comments or perceptions? What is the goal of your participation?
Share Your Story	What content or information will be used to update or feed the social media sites? Who will assist or support users in remixing your message? If you're aggregating content to establish expertise, what sources will you draw from? What skills or expertise do you need?
Spread Buzz	How will you "brand" your presence? (Personal/Organizational) Who will implement and build relationships with influencers? How will you get fans to talk about you to their friends? What actions do you want people to take when they come in contact with your buzz? (Mobilize, spread, remix)
Community Building and Social Networking	How will your organization represent itself in communications? Who will develop or repurpose content? How will it integrate with your web presence? What's your engagement strategy? Who will implement it?

TACTICS: SETTING PRIORITIES

High impact

**Low cost** ← → **High cost**

**Low impact**
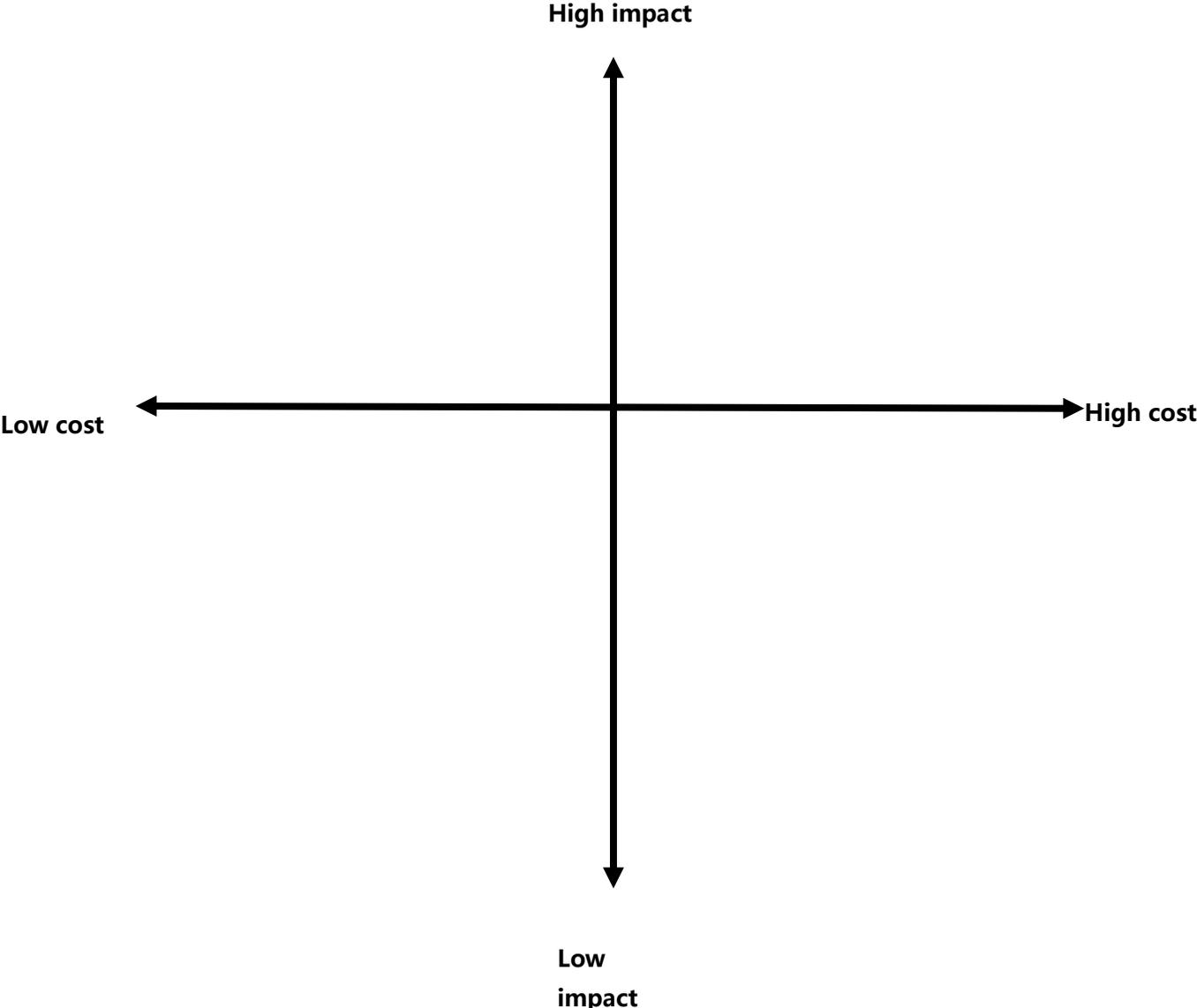
TECHNOLOGY AND TOOLS

LISTENING
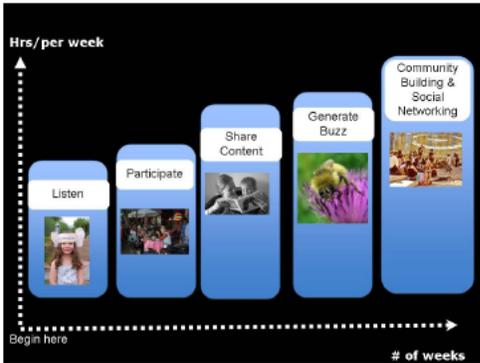
Knowing what is being said online about your organization and the field you work in. You can listen with google alerts, technorati, twitter, and RSS readers. Key skill is pattern analysis. Link listening and analysis to decisions or actions. About 5 hours a week once you learn how to use the tools and make listening a daily habit. (5 hours per week)

PARTICIPATION
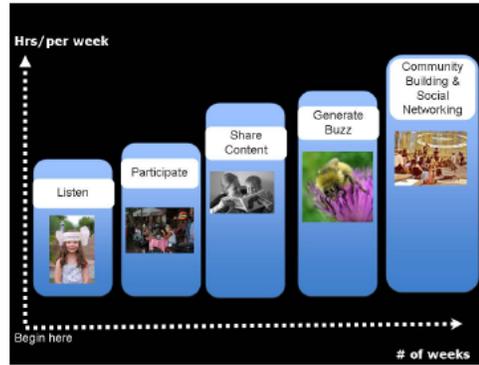
Is joining the conversation with your audience. By making a human connection with people online, you can influence their perception of your brand and help them find meaningful, relevant ways to support your mission. Tools to help you participate are Twitter and Co-Comment. You can also participate vicariously through bloggers by encouraging them to write about your organization. (10 hours per week - also includes listening tasks as they go hand-in-hand)

SHARING YOUR STORY
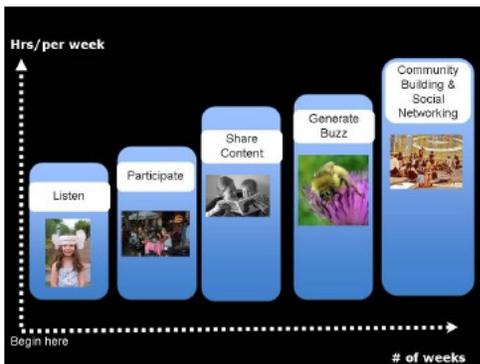
You share stories with tools through blogging, podcasting, photos or video. Once you have content created through these methods, it can be easily shared using the buzz tools and through social networks. But even better is getting your constituents to share their stories about your organization with others (which takes more time) (10-15 per week depending on the type of content, number of different ways you're creating it, and skill)

GENERATING BUZZ
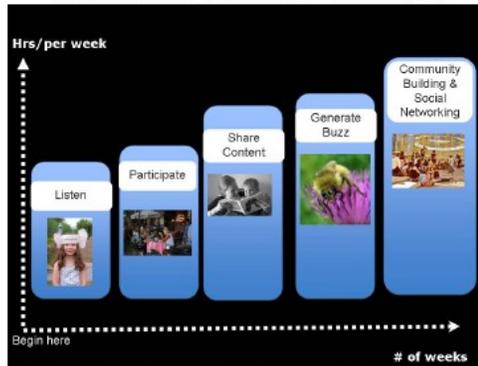
Your raising your brand awareness. What happens is that you share your message with enthusiastic supporters and they in turn may choose to pass it to others with a similar a interest in your organization or campaign. But first, you have to build trust, credibility and -- most importantly -- a relationship with those who might interact with your posted content. Buzz tools include FriendFeed, Twitter, StumbleUpon, and Digg and many others. (10-15 hours per week - also includes some listening tasks)

SOCIAL NETWORKING AND COMMUNITY BUILDING
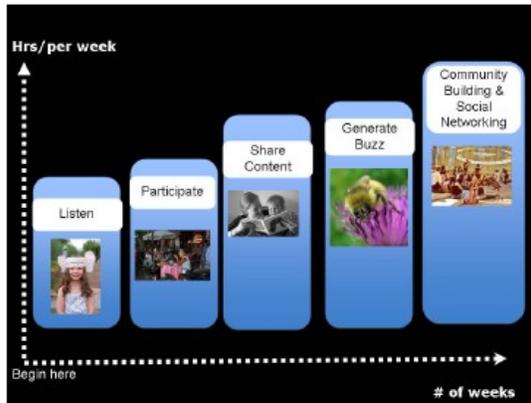
You build relationships online, nurture a community, engage people and inspire them to take an action, or raise money using social networks and apps. Build an online community for knowledge or skill sharing use Ning. . If you're looking to engage and inspire new supporters, setting up an organizational presence on one of the larger social networks. To get results in this category - it requires heavy lifting. I wouldn't advise an organization to start here

Time

Einstein's Theory of Social Media Relativity
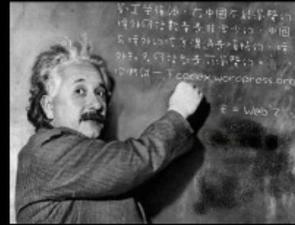
You get out what you put in ...
You have to invest 3-6 months before you see startling results

Conversation Prism

There many more tools than cards. Is there a tool you think will get the objective done?

http://www.briansolis.com

Time

How many hours per week does it take to do Social Media?

Listen
Participate — 5-10 hours per week

Share Content
Spread Buzz — 10-15 hours per week

Community Building and Social Networking — 20+ hours per week

(Via: WeAreMedia project http://bethemedia.wikispaces.com/Materials)

STEP BY STEP: A SOCIAL MEDIA STRATEGY MAP
(eerily similar to a communications strategy map...)

(A complete updated version of this page can found at http://bethemedia.wikispaces.com/Materials)

1. Objective
- What do you want to accomplish with social media?
- Now, restate your objective so it is "SMART" – specific, measurable, attainable, realistic, and time-based. Describe how your social media objective supports or links to a goal your organization's communications plan?

2. Target Audience
- Who must you reach with your social media efforts to meet your objective? Why this target group? Is this a target group identified in your organization's communications plan?
- What do they know or believe about your organization or issue? What will resonate with them? What key points do you want to make with your audience? What social media tools are they currently using? If they congregate in certain online locales, what are they talking about in relation to your brand/goals/issues/competitors?
- What additional research do you need to do to learn about your target audience's online social behavior or understanding of/perceptions about your organization or issues?

3. Integration
- How does your social media support other components of your social media plan? Is there an "offline" component that you need to support/connect?

4. Culture Change
- Once you have an initial strategy, how do you get your organization to own it? How will you address any fears or concerns?
- What is the rate of change your organization can tolerate?

5. Capacity
- Who will implement your organization's social media strategy?
- Can you allocate a minimum of five hours per week to your strategy once you've passed the learning curve? Will your content updates depend on any other resource or person? Do you have the most efficient workflow and tasks in place? Do you need any outside expertise?

6. Tools and Tactics
- What tactics and tools best support your objectives and match your targeted audience?
- What tactics and tools do you have the capacity to implement?

7. Measurement
- What is your original, measurable objective (e.g., # of event attendees or petitions signed)? What hard data points or metrics will you use to track your objectives? How often will you track? Do you have the systems and tools set up to track efficiently?
- How will you harvest insights from hard data and qualitative data as the project unfolds? What questions will you ask to generate insights? Who will participate?

8. Experiment
- What small piece can you implement first as a pilot? How will you learn from the pilot for your next project?

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