

---

---

# COMPLETE GUIDE TO COMMUNICATIONS PLANNING FOR YOUR ORGANIZATION

---

How to Effectively Position your  
Brand for Sustained Success

---

---

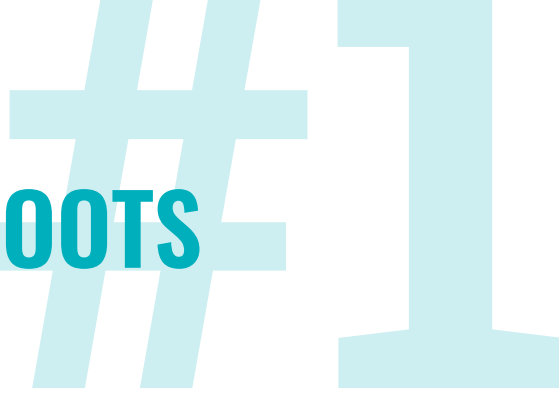
While the fundamentals of marketing and communications haven't changed, the landscape in which you're building and implementing your communications is ever-changing: more channels, more data, more complex customer journeys. And that means you must continuously assess, analyze and adjust.

A strong, strategic communications plan is everything. Done right, it gives your team the focus, information and structure it needs to effectively position your brand and create content that will reach and engage your audiences, and influence their behavior and decisions. Done well, it aligns communications objectives to business goals – underscoring the value of communications in helping ensure your organization's continued growth and success.

Whether you're a skilled and seasoned communicator looking to build on the momentum you generated last year, or you're new to marketing and communications management, continually evaluating and evolving your strategy is critical to your success. In the pages that follow, we've identified six must-have elements that need your ongoing attention throughout the year.

Must-Have

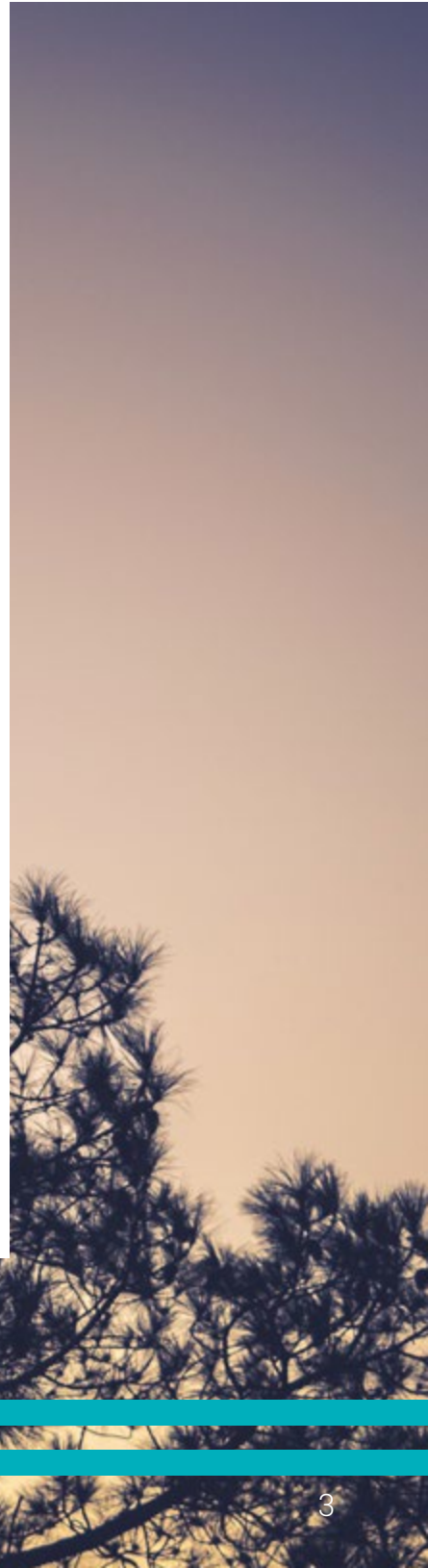
# REAL-WORLD ROOTS



Legendary historian and documentarian James Burke famously quipped, “You can only know where you’re going if you know where you’ve been.” The translation to marketing and communications is easy – and apt. Many communicators are anxious to dig right into planning, eager to show how they’ll improve on the year before, and ready to prove themselves with ambitious thinking and bold ideas.

Check the “go big or go home” mentality at the door (at least for now). For sure, visionary concepts and grand ideas have their place. But above all else, your plan needs to be founded and grounded in the real world. Understanding the current state of affairs is your first order of business.

The smartest communications plans are informed and supported with data, trends and experience – historical and real. Analyze your company, its marketplace and the competition. Each quarter, take a close look at what elements are delivering results and which ones fell short of ROI. These insights contribute to a communications strategy that balances reality with ambition. And that’s the kind of plan that will successfully tie communications outcomes to business goals.



# DID YOU SWOT?

A SWOT (strengths, weaknesses, opportunities, threats) analysis is a valuable process for every communicator – and communications plan.

Strengths and weaknesses represent the internal state of affairs within your current communications strategy. You might consider evaluating the current capabilities or competencies of your team, the quality of

communication, or the accuracy and volume of data you are collecting.

Opportunities and threats constitute external factors that could affect your overall strategy – from competition to emerging communications channels. You might analyze market research, and determine if/how the channels you currently use are trending upward or downward.



## Strengths

- Advantages
- Capabilities
- Resources, assets, people
- Marketing reach and awareness



## Weaknesses

- Lack of competitive strength
- Financials
- Vulnerabilities
- Timescales, deadlines and pressures



## Opportunities

- Market developments
- Business and product development



## Threats

- Environmental effects
- Market demand

**Tip:** Don't get stuck in the weeds. Use a one-page matrix with bullet points to keep it simple, yet insightful.

Real-world roots:

# WHAT'S NEXT?

---

1. Set aside time to think through the SWOT exercise and assign owners for each area of research
2. Speak with a few other members of your organization for initial input
3. Ensure your plan ties business goals to your findings

Must-Have

# A WELL-DEFINED AUDIENCE

# #2

“I don’t know the secret to success, but I do know that the secret to failure is trying to please everybody.” It’s a mantra for life and communications. Your target customer isn’t everyone.

Consider the sneaker business. It’s a huge market. Arguably, every person needs a pair, right? But the most successful sneaker companies know better. They focus on very specific targets. Look at Nike’s website; the brand zeros in on fitness, sports and winning. On the flip side, Converse centers on making a personal identity statement. Its Google ad drives it home: “Shoes are boring. Sneakers are iconic.”

Owning a specific market’s mindshare is key. No matter what product you sell or service you deliver, the more targeted your communications, the better your return – every time. Your plan needs to reflect this mindset. Define your audience narrowly. Who matters most to your business? Once you know this, other elements of your strategy will follow, including your positioning and messaging.



# WHO IS YOUR IDEAL CUSTOMER?

Creating buyer personas – a fictional profile of your ideal customer – is a worthwhile exercise. Use a combination of raw data and educated assumptions to define who your customers are and what makes them tick. What keeps IT Ian up at night? Where does HR Hillary get her news? How does CEO Cathy measure success? Here are three places to look for insights:

**1. Your site analytics.** Look at where your visitors come from, the keywords they use to find you, how long they stay once they arrive. This data can reveal the desires that led your audience to your site as well as the tools they used to get there.

**2. Social media.** Social listening on Twitter, Facebook, LinkedIn, and even Snapchat and Instagram, can unearth valuable nuggets of data – what your customers care about (and what irks them), where they gather and who they associate with.

**3. Your current customers.** Go right to the source. Surveys and interviews are often critical components to building useful personas. Ask about their goals, values and pain points.



## Sample Sally

Department Manager  
Mid-sized company – 25-200 employees;  
small team – 1-5 people  
Master's degree  
Married with 2 kids; commutes 1 hour+ roundtrip



## Goals & Responsibilities

Improve connection with sales  
Strengthen pipeline; lead generation



## Challenges & Concerns

Not enough resources  
Data/technology overload

**Tip:** Your personas will change as you discover more information about your major types of customers and what motivates them. Set a reminder to revisit and update personas quarterly.

A well-defined audience:

# WHAT'S NEXT?

---

1. Identify your organization's key audiences; prioritize them into buyer categories
2. Create a "data set" – questions that probe at what you want/need to know about each buyer
3. Schedule "interviews" with a handful of current customers, using the questions to guide your conversation



Must-Have

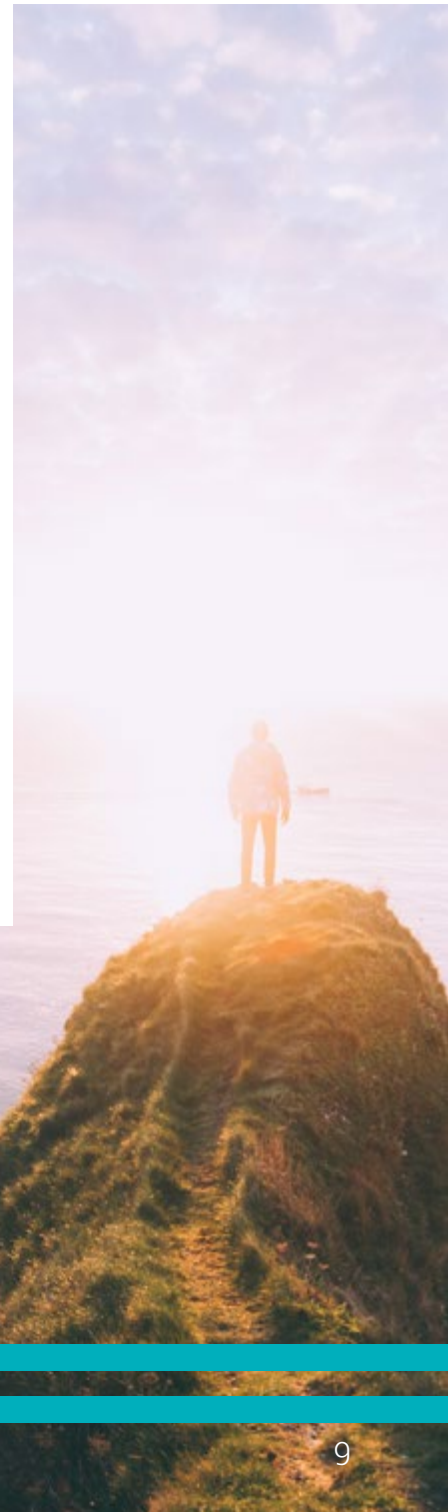
# STAND-OUT POSITIONING AND MESSAGES

# #3

You've taken a temperature check of the environments in which your company lives and operates. And you also know who your target audiences are, and defined their challenges and needs. Now it's time to figure out how to talk to them while differentiating your brand amongst the competition.

Message development is a critical part of any communications plan; it helps refine your brand's position in the marketplace, define and strengthen its voice, and ensure it gets heard by those who matter most. Key messages aren't the same as a mission statement. They don't equate to a catchy slogan or tagline either. But they are informed by and support each of those elements.

Consider using a chart like the one on the next page to help you frame and refine your messaging, and bring each of the essential elements of brand voice and message together.



<b>MISSION</b>	<p>What does your brand strive to do? What is your ultimate goal?          What are your core beliefs?</p>		
<b>POSITIONING STATEMENT</b>	<p>Define where you fit into the marketplace; this guides internal and external messaging.</p>		
<b>AUDIENCES</b>	<p>You know this! Always keep your ideal buyers in mind to ensure all messaging resonates with their needs, motivations, interests and pain points.</p>		
<b>TONE OF VOICE</b>	<p>Are you a fun, playful brand? Or are you more conservative and formal? Tone development exercises – comparing your brand to different well-known brands, celebrities, cars, cities, etc. – can help solidify your brand’s tone. So can creating “We are... but not...” statements.</p>		
<b>ELEVATOR PITCH</b>	<p>How would you describe your brand in 30, 60 or 90 seconds? Nailing this helps simplify your brand messaging and also helps ensure everyone in your organization speaks the same language when asked, “What do you do?”</p>		
<b>BRAND PILLARS</b>	<p>What are the three most important selling points of your product or service? Each brand pillar will be supported by a key message and proof points.</p>		
<b>KEY MESSAGE</b>	Pillar #1	Pillar #2	Pillar #3
<b>PROOF POINTS</b>			

# CAN YOU HEAR ME NOW?

Smart, well-crafted key messages are a powerful tool for bringing focus and clarity to your communications strategy, campaigns and tactics. Here are 8 questions to pulse-check your brand messages:

1. Do they produce a clear picture in your mind that's different from your competitors?
2. Do they identify your brand's unique value to your customers?
3. Do they speak your customers' language?
4. Are they supported by proof points?
5. Are they memorable and motivating?
6. Are they easy to understand?
7. Are they difficult to copy?
8. Will they help you make more effective marketing and branding decisions?



**Tip:** Einstein once said, "If you can't explain it to a six-year-old, you don't understand it yourself." Make sure your messages are "kid-tested, parent-approved."

Stand-out positioning and messages:

# WHAT'S NEXT?

---

1. Audit current messaging on key materials, collateral and digital assets
2. View and compare competitor messaging and positioning as seen on their websites, news releases and media coverage
3. Experiment and take risks with bold language to push beyond your comfort zone

Must-Have

# MEASURABLE GOALS — TIED TO TANGIBLE BUSINESS OUTCOMES

People who explicitly make resolutions are 10 times more likely to attain their goals than those who don't. Marketing and communications goals are no different. But setting goals is only a small piece of the communications planning pie; goals need to be SMART (specific, measurable, actionable, realistic and time-bound). And more importantly, they need to support the bigger business strategy.

C-suite leaders want to know how communications and marketing help the company grow. Every goal you set and every tactic you employ should somehow contribute to achieving overarching business outcomes. If they don't, you'll have a hard time justifying the spend – of time and money. Sure, some foundational work may not immediately appear to be aligned. But if implementing a new inbound marketing campaign is a must, for example, make sure you can explain how it will ultimately improve communications effectiveness and bring in new business in the future.

To help ensure your communications goals align with your company's high-level business strategy, consider the following tips.

- » **Make sure your team is involved in marketing and other planning processes from the beginning.** You can't align with anything if you're not in the loop.
- » **Pick meaningful metrics and continually track progress.** CEOs and CFOs typically think about marketing and communications in terms of how much revenue they help influence. Make sure your metrics are simple, relevant, and can show results through the buyers' journey of awareness, engagement, qualified opportunities and, eventually, closed deals.
- » **Be realistic about what you can deliver.** One of the common mistakes made when building a communications plan is not accounting for the actual capacity available on the team to complete it. You need a clear view of the people, budget, time and other resources needed to execute and achieve your goals.

# WORK SMARTER, NOT HARDER

NFL coaching legend Tom Landry said it: “Setting a goal is not the main thing. It is deciding how you will go about achieving it and staying with that plan.”

SMART criteria – the commonly used framework adapted from Peter Drucker’s management by objectives concept – can help you set specific, measureable, actionable, responsible and time-bound communications goals.

S

## **Specific**

What’s the goal? Consider **who** is involved, **what** we want to accomplish, **where** will it be done, **why** we’re doing this (purpose) and **which** constraints and/or requirements we have

M

## **Measurable**

How will we know when we’ve achieved success? Identify quantitative and/or qualitative metrics

A

## **Actionable**

What are the stepping stones or individual actions needed to achieve the goal?

R

## **Responsible**

Assign ownership. Who will take the lead on each action and be held accountable for progress?

T

## **Time-bound**

Set deadlines – or at least milestone timeframes – for when progress should be made and goals achieved

**Tip:** It’s easy to want to set the bar high (high standards and ambition are good things – in moderation). But don’t set yourself up to fail. When it comes to goals, quality trumps quantity. Set no more than three goals that will truly make an impact when reached.

Measurable goals tied to tangible business outcomes:

## WHAT'S NEXT?

---

1. Schedule periodic sit downs with senior leadership to confirm the organization's business direction and top goals
2. Evaluate how your communications objectives support the business strategy
3. Use the SMART framework to create, prioritize and update your goals; determine the metrics by which you'll measure success

Must-Have

# RESOURCE-CONSCIOUS BUDGET

Money is an imperative marketing and communications ingredient, but it can't guarantee success on its own. No matter how big your budget is, you'll likely always wish you had more. Same goes for talent. Your team is one of the most valuable assets you have, but you'll probably always want more people power. It's not how deep your pockets are that really matters; it's how well you invest (in) what you have.





# IT'S NOT ALL ABOUT THE BENJAMINS

It is about organization and maximization. Create a **Master Marketing Budget** for perspective on the big picture and to see all of your expenses in one place.

- » When considering **Personnel** costs, budget beyond salaries alone: e.g., bonuses, benefits, travel and expenses like team lunches and small perks.
- » Allocate separately for **Planning + Strategy** activities like programming and ongoing brainstorming and ideation; consider investments in branding, market research, buyer persona development, positioning and messaging workshops, and story development.
- » **Digital** budgeting accounts for major initiatives like a website redesign and social campaigns to everyday expenses, such as stock photography fees and web hosting costs.
- » **Content Marketing + Creative** might include full inbound marketing campaigns, content creation of tools like infographics, e-books and white papers, videos, blogs, email campaigns and regular newsletters.
- » **Earned Media + Public Relations** are about so much more than press releases. Strategic PR investment – from media training and headline development, to op-ed and guest blog opportunities and news conferences – can be diverse and broad.
- » **Events + Partnerships** track everything from tradeshow involvement, webinars, customer events, speaking placements and sponsored conference opportunities.



**Tip:** Remember those all-important business outcomes? Evaluate budget investments in the context of value to the business. For each budget item, consider the anticipated ROI or deliverable. When it comes to possibly needing to cut items, seeing the quantifiable value adds clarity to tough decision making.

Resource-conscious budget:

# WHAT'S NEXT?

---

1. Start with some budget parameters so you know what you have to work with
2. Consider a blend of in-house resources, freelancers and consulting support or external agency relationships to get the most bang for your buck
3. Get organized: gather all the needed cost estimates and vendor proposals for possible projects and support

Must-Have

# BUILT-IN FLEXIBILITY

# #6

With your goals set and your budget balanced, your communications plan must be finished. Not so fast. Your plan lives and breathes – and evolves – every day until it’s time to strategize for next year.

Inevitably, your plan will shift. Plan for it.

In a world of constant change, the spoils go to the nimble. Position yourself – along with your team and the entire marketing/communications function – as a problem solver by showing how your plan accounts for and can respond to the “what ifs” of business.

The best plans consider the worst scenarios, but it’s not all about preparing for crises. More so, it’s about careful listening, forward thinking, and the ability to be agile if and as needed. No one – and no plan – can predict with certainty what will occur over a 12-month timeframe. You can, however, map out scenarios of what *could* happen that would alter your approach, and create alternate plans that can be quickly dusted off and put into action.



# SHIFT HAPPENS

Here are a few situations that may cause you to adjust your communications course.



## Changing Customer Behaviors

Something may have changed how your customers think about your business and how they engage with it, which could cause you to rethink some of your plans.



## Marketplace Fluctuation

Let's face it, virtually every category is a dynamic one; some are more of a roller coaster than others. You can't foresee all the ebbs and flows, but you can be ready and able to change your thinking while on the ride.



## Sales Shifts

Whether numbers have skyrocketed or slumped, if you're tracking performance against your forecast, you'll know when it's time to pull back, push harder or refocus communications efforts to support sales.



## Unexpected Competitive Activity

Your competitors can be sly. New disruptive innovation? Major merger or acquisition? Unfortunately, you won't always catch wind of what your competitors are planning before it's public news.



## Emerging Technology

It seems like new platforms pop up every day. Most aren't worthy of your attention or precious dollars, but some may warrant exploration – or even, experimentation.

**Tip:** Consider adopting a “traffic light” system to assign levels of urgency to situations that may (or may not) require changes to your plan. For example, a green light means all is well, a yellow light means some attention is needed or flag for follow-up, a red light indicates a situation is critical and requires immediate action.

Built-in flexibility:

# WHAT'S NEXT?

---

1. Identify 3-5 scenarios that could significantly affect your plan – and create a brief mini-plan outlining your strategy to address each one
2. Assign owners to track with select situations (e.g., liaise with sales, follow competitor activity, research new technology, etc.)
3. Consider a monthly meeting to review new findings, and determine which warrant immediate action and which should be flagged for future follow-up

# PLAN TO EVOLVE


Strategic communications planning is part art and part science. It's ever-evolving and features many moving parts. It's a rigorous, ongoing process, but it's also full of opportunities to showcase creative thinking, experiment with new tools and platforms, and inspire big(ger) ideas. Have fun with it.

But don't underestimate the power of a well-done communications plan. It will contribute to meaningful results for your organization. It will also position you and your team as valuable players in the future of the business.

**Never stop measuring, analyzing and refining your plan.** If you need some expert help along the way, don't be afraid to ask.



 [hello@sternstrategy.com](mailto:hello@sternstrategy.com)

 (908) 276-4344

Schedule a  
Consultation

## Ready for the road ahead?

Let's talk about how to set yourself (and your company) up for sustained success.

[sternstrategy.com](http://sternstrategy.com)

