**Campaign Communications Planning Worksheet**

**CAMPAIGN GOAL**

*What result/s does your campaign overall seek to accomplish?*

**KEY DYNAMICS/LANDSCAPE**

*What are the important dynamics that will affect your ability to achieve your goal? Who are (or could be) the key players? What is your assessment of them on this issue? How will they behave and be affected? By what or by whom?*

**CAMPAIGN STRATEGIES**

*Given the dynamics at play and your assessment of the key players and the abilities of your organization and allies, what is your theory of how your campaign goal can be achieved? Your key targets should clearly emerge here.*

**COMMUNICATIONS GOALS**

*What end results are needed from communications work to help your campaign strategies succeed? List in priority order – what is an absolute must vs. what may be nice to accomplish but won’t necessarily make or break your campaign strategy.*

**AUDIENCE ANALYSIS**

*Given your campaign strategies, targets, and communications goals, who are the audiences your communications will need to reach and resonate with? List them in order of priority, and list some of the values/interests/aspirations for those audiences that you also share and could connect with in your campaign. Draw on opinion research and your own experience.*

**OPPOSITION MESSAGES/CHALLENGES ANALYSIS**

*Who will oppose your campaign and goal? What messages and tactics will they use? Even if you don’t anticipate explicit opposition, what are hurdles you will face in attempting to achieve your communications goals? Think here about challenges in the opinion as well as media landscapes.*

**CORE POSITIONING (FRAMING/NARRATIVE)**

*Given your audiences, opposition, campaign strategies and communications goals, what is the best way to position (or frame) the issue at hand to succeed? State this in a brief sentence or two. It should be something all of your audiences can easily nod in agreement with while putting your opposition on difficult ground to oppose. No process or jargon or detailed facts here – instead, shared values/aspirations/interests need to be at the heart of both what’s at stake and the path forward. (Remember, this is overall positioning, not a statement of every message that will be helpful and important during your campaign -- that section comes next below. The idea here is that this is the positioning you can’t afford not to drive home if you’re going to be successful. In your campaign’s delivery of key messages, you’ll be seeking to have those help reinforce this overall positioning when possible. If your campaign will have a name or public slogan, those should definitely echo this core positioning.)*

**(OPTIONAL) AN INTERNAL CORE POSITIONING/FRAMING SLOGAN**

*If desired, in just a few words distill your core positioning down to ‘bumper sticker’ length (e.g. “Let’s lead”). This is not meant to be a slogan you will use publicly necessarily, but rather for internal use in your campaign as a sort of guiding light to easily remember the ultimate core positioning goal.*

**KEY MESSAGES/CONTENT**

*Thinking about your communications goals, audiences and challenges/opposition, list here the key messages that will be important to drive home during your campaign. Under each one, list the facts, stories, analysis, data, and imagery that you can draw on to illustrate and back up those messages. (Some of these messages that will be helpful in your campaign will connect more obviously and directly to your core positioning and others less so – that’s ok. Of course none of these should undermine your core positioning. When delivering these messages throughout the campaign, you’ll be looking to also take the opportunity to reinforce your core positioning at the same time.)*

**MESSENGERS**

*Who should your key audiences see speaking and acting in your campaign? Which messages are they best suited to deliver? Who should stay more behind the scenes?*

**TACTICAL PRIORITIES**

*What specific tactical priorities follow from your communications goals? These will vary depending on how you have defined and prioritized the role communications needs to play to support your campaign strategies. Think here not about specific communications activities you will execute but rather identify the needs, such as “shape editorial opinion at \_\_\_ media outlet before \_\_\_ date” or “win the early battle for how a new compliance policy vehicle is described in the news media” or “train spokespeople by \_\_\_ date” or “get media attention to \_\_\_ aspects at least twice in advance of \_\_\_ campaign moment.”*

**TACTICS DETAIL & CALENDARING**

*This is where you begin to fill the much more specific details on your ideas for activities and materials to address the tactical priorities identified above. For example, on media you can identify here the likely timing of hard news hooks, proactive event-driven media you’ll initiate, as well as non-event driven story pitches and opinion pieces along with target outlets and authors. For direct outreach efforts, identify the timing of actions you’ll be pushing and the channels and content needs. Make a list of materials needs, including Q&A’s, talking points, web content, backgrounders, phone bank scripts, etc. Note any paid media plans along with channels and concepts. Use a calendar to note when activities will occur, paying attention to strategic needs around key decision or compression points. This part of your plan is definitely a “living document” -- start by planning and calendaring what you can at the outset, then fill in and change as needed along the way.*