Communications Processes

Getting Started with a Communications Strategy

These training materials have been prepared by Aspiration.
Who is Aspiration?

- Aspiration helps nonprofits and foundations use software tools more effectively and sustainably.
- We serve as **ally, coach, strategist, mentor** and **facilitator** to those trying to make more impactful use of information technology in their social change efforts.
- [www.aspirationtech.org/services](http://www.aspirationtech.org/services)
Agenda

- Introduce processes & templates for planning and maintaining your online activities
- Share examples of how organizations have used these processes
- Share resources for diving deeper into enhancing your communications strategy
- This presentation is in beta – your feedback is welcome!
What are your goals?

- Measurable
- What does success look like?
- Tool-Agnostic
  - Make sure your communications plan stays in tact when the tool you are using fails you
Tool Agnostic?

Goal → Tool → Goal

Goal → Tool → Goal

Goal → Tool → Goal

Goal → Tool → Goal
## Example Goal

<table>
<thead>
<tr>
<th>Goal</th>
<th>Measurability</th>
<th>What does success look like?</th>
<th>Tools</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase attendees at “awareness action” through online efforts</td>
<td>Compare this year's attendance to last year's</td>
<td>10% increase in attendance from last year</td>
<td>Email Blast, Texting, Facebook</td>
</tr>
<tr>
<td>Increase # of members at regular meetings and in leadership positions</td>
<td>Compare meeting attendance</td>
<td>Double meeting attendance &amp; engage 10 new people in positions</td>
<td>Email Blast, Texting, Facebook, Twitter, Surveys, Individual Emails</td>
</tr>
<tr>
<td></td>
<td>Compare % of new people in positions</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Four Processes

Audience Assessment → Tracking & Metrics → Publishing Matrix → Message Calendar
4 Processes for Sustainability

- **Audience Assessment**
  - Do you really know who you are talking to?

- **Publishing Matrix**
  - Do you have a model for when to use what tool?

- **Message Calendaring**
  - Is all online messaging on a unified calendar?

- **Tracking**
  - Do you know where you're mentioned online?
Audience Exercise

Who are your top audiences?
Audience Assessment

Audiences

- Low income youth of color working in Real Food
- General public youth

LIVE REAL
REAL FOOD. REAL PEOPLE. REAL CHANGE.
Know Thy Audience(s)

► Audience survey
  ► How do you analyze web traffic?
  ► What is one thing you would tell a peer about using online tools to identify their audiences?

► Baseline Indicators
  ► Pages viewed, search keywords used
  ► Where does traffic come from; who links to you?
  ► Which mailing list segments drive what traffic?
  ► Other tricks?
Know Thy Audience(s)

- Email
  - Who opens your emails? Who clicks on links?

- Facebook
  - Who are your “friends”/“fans”? Who are theirs?

- Twitter
  - Who is following you? Who is re-tweeting you?

- Blogs
  - Who comments, who reposts, who links back?
  - Who subscribes to your feed(s)
Spectrum of Engagements

- Target Audience
- Frequency of Messaging
- Return on Investment
Target Audience

LinkedIn

Hey, are you in 6th grade? Interested in Soccer? Come to our Soccer Club in the park on Saturday!
Target Audience

Here's an infographic and blog post that summarizes research on several different social media platforms including Facebook and Twitter on the best and worst times to post. What has been your experience?

Like · Comment · Share

Beth Kanter

Tuesday @

1pm to 4pm

8pm to 8am

Traffic builds

Traffic fades

1pm to 3pm

8pm to 9am

Traffic builds

Traffic fades

1pm to 4pm

8pm to 8am

Here's an infographic and blog post that summarizes research on several different social media platforms including Facebook and Twitter on the best and worst times to post. What has been your experience?

Like · Comment · Share

Chris Tuttle

I always hate these things. These times are clearly chosen by who owns the social media.

OMO, this is the equivalent to saying the best time for transit organizers to gain petition signatures is during rush hour. Sure, you'll get more. See More

Like · Reply · 39 · Tuesday at 9:45am

Beth Kanter

Well said Chris Tuttle -- this is the first infographic that I've seen that lists specific times for many platforms...again only use it as a guide, knowing your audience and watching your own metrics is even better.

Like · Reply · 39 · Tuesday at 9:45pm

Jill Persin

I think these charts are often industry- and purpose-specific. A corp marketing its products

Write a reply...
Consider a **Publishing Matrix**

- **Audience survey:**
  - Do you have an integrated way for deciding which messages go to which online channels?
  - What's tweet-worthy, what is “just” web content?

- **Do you model your tools as a spectrum?**
  - Tone and voice
  - Time and labor investment vs ROI
  - Appropriateness of message to channel
# Publishing Matrix

<table>
<thead>
<tr>
<th>Content Types</th>
<th>Website</th>
<th>Email List</th>
<th>Blog</th>
<th>Facebook</th>
<th>Twitter</th>
</tr>
</thead>
<tbody>
<tr>
<td>eNewsletter</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Event Announce</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Action Alert</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fundraising Appeal</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Blog Post</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Press Release</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Staff</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>
Questions for Channels

- **Who is our audience for this channel?**
  - Strangers? Fans? Funders?

- **Do they want this type of content?**
  - What value is it providing? Are they getting it somewhere else?

- **If yes, how should we deliver it?**
  - Tone? Referring link? Full content piece?
# Publishing Matrix

<table>
<thead>
<tr>
<th></th>
<th>Website</th>
<th>Media List</th>
<th>Immigration List</th>
</tr>
</thead>
<tbody>
<tr>
<td>Press Releases</td>
<td>Post PR to News Page</td>
<td>Send to Media Contacts via CC</td>
<td></td>
</tr>
<tr>
<td>Media Advisories</td>
<td></td>
<td>Send to Media Contacts via CC</td>
<td></td>
</tr>
<tr>
<td>e-News</td>
<td>Link to appropriate pages</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e-Blasts</td>
<td>Link to appropriate pages</td>
<td></td>
<td>Send via CC</td>
</tr>
<tr>
<td>Reports (Issue Research)</td>
<td>Update to Research</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Report</td>
<td>Update to Research</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Event Announcements</td>
<td>Update to Calendar</td>
<td></td>
<td>Send via CC</td>
</tr>
<tr>
<td>Website Update</td>
<td>Update appropriate page</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Post Action</td>
<td>Add &quot;news&quot; to website</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Website</th>
<th>Media List (CC)</th>
<th>Immigration List</th>
</tr>
</thead>
<tbody>
<tr>
<td>Press Releases</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Media Advisories</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>e-News</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e-Blasts</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
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<td>X</td>
<td></td>
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</tr>
<tr>
<td>Annual Report</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Event Announcements</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Website Update</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Post Action</td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Pub. Matrix Next Steps

- Build out your publishing matrix
- Define your processes
- Share it with your org to create an organizational asset
- Look for places to adjust your communications
  - Channels you aren't using as much as you could
  - Content types that could be recycled
  - Processes that don't have an owner
Calendar Your Messaging

▶ Audience survey
  ▶ Do you preschedule online messages? How far?
  ▶ Do you model messages within narrative arcs?
  ▶ Do you have pre-send and post-send checklists?

▶ Message calendars enable you to
  ▶ Track messaging arcs
  ▶ Sustain consistent messaging
  ▶ Coordinate internal processes and projects
  ▶ Avoid list fatigue
## Calendar Your Messaging

<table>
<thead>
<tr>
<th>Important Dates</th>
<th>January</th>
<th>February</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Template Areas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subject Line</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Engagement Ask</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Main Content Part 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Main Content Part 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Main Content Part 3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sidebar 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sidebar 2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Calendar Your Messaging

<table>
<thead>
<tr>
<th>Important Dates</th>
<th>January</th>
<th>February</th>
</tr>
</thead>
<tbody>
<tr>
<td>5th – Quarterly Newsletter</td>
<td>20th – Party Reminder 11th – Party Last Chance 12th – Annual Member Party</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Email Template Areas</th>
<th>January</th>
<th>February</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject Line</td>
<td>You’re Dying to Know What We’re Up To...</td>
<td>Register Now for our Annual Member Party</td>
</tr>
<tr>
<td>Engagement Ask</td>
<td></td>
<td>Last Chance to Get in on the Fun!</td>
</tr>
<tr>
<td>Main Content Part 1</td>
<td>Annual Member Party</td>
<td>Party Purpose</td>
</tr>
<tr>
<td>Main Content Part 2</td>
<td>Take action around deforestation!</td>
<td>Party Details</td>
</tr>
<tr>
<td>Main Content Part 3</td>
<td>Welcome our Two new employees</td>
<td></td>
</tr>
<tr>
<td>Sidebar 1</td>
<td>Register Now! Button</td>
<td>Register Now! Button</td>
</tr>
<tr>
<td>Sidebar 2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Tell 'em Triple

Tell 'em what you're going to tell 'em

- Ex. “We're planning our next set of trainings, what topics would most interest you?”

Tell 'em

- Ex. “Thanks for your feedback! Here are our upcoming trainings offerings.”

Then, Tell 'em what you told 'em

- Ex. “We had a great training series, here are the materials we covered. Let us know what you think!”
# Calendar Your Messaging

<table>
<thead>
<tr>
<th>California School-Age Consortium</th>
<th><strong>MESSAGING CALENDAR</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>E = external calm</strong></td>
<td>January</td>
</tr>
<tr>
<td><strong>Calendar</strong></td>
<td>February</td>
</tr>
<tr>
<td><strong>Statewide Programs</strong></td>
<td></td>
</tr>
<tr>
<td>Challenge</td>
<td></td>
</tr>
<tr>
<td>Policy/Budget Campaign</td>
<td></td>
</tr>
<tr>
<td>Alerts</td>
<td></td>
</tr>
<tr>
<td>Leadership Development Institute</td>
<td></td>
</tr>
<tr>
<td>State Conference</td>
<td></td>
</tr>
<tr>
<td><strong>Chapter Events</strong></td>
<td></td>
</tr>
<tr>
<td>BA Chapter</td>
<td></td>
</tr>
<tr>
<td>SAC Chapter</td>
<td></td>
</tr>
<tr>
<td>LA Chapter</td>
<td></td>
</tr>
<tr>
<td>OC Chapter</td>
<td></td>
</tr>
<tr>
<td>SD Chapter</td>
<td></td>
</tr>
<tr>
<td>NC Chapter</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Event</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/30</td>
<td>All Contacts, MESSAGE</td>
</tr>
<tr>
<td>1/31</td>
<td>All contacts, Stop elimination of funding to 11-12 year olds</td>
</tr>
<tr>
<td>2/1</td>
<td>All Cal, MESSAGE</td>
</tr>
<tr>
<td>2/2</td>
<td>All Cal, MESSAGE</td>
</tr>
<tr>
<td>2/3</td>
<td>All Cal, MESSAGE</td>
</tr>
</tbody>
</table>

[California School-Age Consortium logo]
Evolving Your Calendar

- You can't know the future when you calendar
  - Your calendar must be adaptable

- Be ready to respond to:
  - New developments in campaign
  - Shift in organizational priorities
  - Current events: tie breaking news to campaign

- Calendar changes must be transparent
  - All stakeholders need to know what and why
What is Online Communications Today?

- Conversations with people online
  - Social media
- Made for people, not organizations
  - It's not going to work perfectly
- Not your virtual megaphone
Consider Listening Online

- Do you want to know what messages or topics are working?
- Do you know who else is influencing your core topics online?
Benefits to Listening Online

How is it valuable?

- Be part of the conversation
- Save $$$
- Less guessing
Tools to Listen

- Online Listening
  - Dashboards
    - Netvibes
    - Storify

- New Content Feeds (RSS)
  - Google Alerts
  - Bing Search

- Twitter Listening
  - Hootsuite
  - Commun.it
  - Followerwonk
  - Tweetlevel
Watch a Social Media Dashboard

- Free, low-cost and pricey tools exist to let you track how you're being seen online
  - NetVibes, Storify, Feedly, Radian6, etc

- Use a dashboard to track strategic keywords
  - Campaign and issue keywords, key staff names
  - Target, opponent, and decision-maker names

- Is your outbound messaging propagating?
  - What are the reactions?
Social Media Listening Dashboard
Consider Tracking Analytics

- Attached to measurable goals, analytics are your thermometer
  - Make sure you know what goal the data is speaking to
- Helps determine what value you’re providing to whom
- Tracking is key!!
  - Trends more important than isolated numbers
# Tracking Doc Example

<table>
<thead>
<tr>
<th>Website</th>
<th>Social Media</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visits</td>
<td>% Bounce</td>
<td>Top Referrer</td>
</tr>
<tr>
<td>week 1/1 - 1/7</td>
<td>1/8 - 1/14</td>
<td></td>
</tr>
<tr>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
</tr>
</tbody>
</table>

## SSC Blog

<table>
<thead>
<tr>
<th></th>
<th>09/09/11 to 09/15/11</th>
<th>09/16/11 to 09/22/11</th>
<th>09/23 to 09/29</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impressions</td>
<td>278</td>
<td>230</td>
<td></td>
</tr>
<tr>
<td>Clicks</td>
<td>1</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>CTR</td>
<td>0.36%</td>
<td>0.00%</td>
<td></td>
</tr>
<tr>
<td>Avg CPC</td>
<td>$1.00</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>Cost</td>
<td>$1.00</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>Avg. Position</td>
<td>5.9</td>
<td>5.5</td>
<td>6.4</td>
</tr>
<tr>
<td>Visits</td>
<td>344</td>
<td>329</td>
<td>358</td>
</tr>
<tr>
<td>Page Views</td>
<td>451</td>
<td>427</td>
<td>443</td>
</tr>
<tr>
<td>Bounce Rate %</td>
<td>85.17%</td>
<td>88.15%</td>
<td>87.99%</td>
</tr>
<tr>
<td>Avg. Time on Site</td>
<td>01:09</td>
<td>00:52</td>
<td>00:56</td>
</tr>
<tr>
<td>% New Visits</td>
<td>88.95%</td>
<td>86.02%</td>
<td>89.66%</td>
</tr>
<tr>
<td>Bit.ly Referrers</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Twitter Referrers</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>FB Referrers</td>
<td>6</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>Notable Referrers</td>
<td>hosted.vertex.com</td>
<td>hosted.vertex.com</td>
<td>socialsource.co</td>
</tr>
</tbody>
</table>

## Top Page

- /2011/04/face
- /2011/04/face
- /2011/04/face
- /2011/04/face
- /2011/04/face

## Second Most Popular Page

- /2011/03/crea
- /2011/04/imad
- /2011/04/imad
- /2011/03/crea
- /2011/03/crea

## Third Most Popular Page

- /2011/04/imad
- /2011/03/crea
- /2011/03/crea
- /2011/03/crea
- /2011/03/crea
Workflow

► Send Action Alert
  ► Go through Publishing Matrix and send according to Message Calendar
  ► After action time period complete, check out analytics
    • Use Dashboard to SEE the content that corresponds with the #s
  ► Fill in analytics doc to compare to past messaging
    • Adjust publishing matrix, message calendar accordingly
Four Processes

Audience Assessment

Tracking & Metrics

Publishing Matrix

Message Calendar
Obligatory Admonitions

- Control and unify your online identity
  - Route as much engagement as possible through domain name(s) you control
  - Strive for disintermediated fallbacks

- Presume Facebook and Twitter will die violently or fade to dust
  - See: “Friendster”

- Specific case: Blogs
  - OurEDBlog.typepad.com is a bad idea
Summary

- Have processes in place for
  - Audience Assessment
  - Publishing Matrix
  - Message Calendaring
  - Tracking

- Control your identity and your data
  - Take control of your online destiny
  - Your data is your digital power and your path to fundraising success
Thank You!

- Questions?

- Comments?
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