It’s that time of year when internal communicators start thinking about strategy for the year ahead. **NISHWA ASHRAF** leads us through the nine steps to developing the perfect strategic communication plan.

**9 STEPS TO EFFECTIVE STRATEGIC PLANNING**

Providing a basis for monitoring progress, assessing results and impact, and facilitating new program development, strategic planning helps assure that the internal communication function remains relevant and responsive to the needs of the business. But for many internal communication professionals, the prospect of having to engage in strategic planning can be unnerving.

“Where to start?”, “What does it require?”, “How do I drive the process? And, “How will I measure the success?” are common questions that, despite the increasing business focus of the modern internal communication function, depict strategic communication planning with a reputation for complexity and challenge that far exceeds reality.

Essentially, the strategic planning process integrates many of the management practices practitioners already do day-day, but provides a methodical framework that can help reach robust strategic decisions.

So, whether you’re building your annual communication plan, exploring longer-term functional objectives or designing particular initiatives, use this nine-step guide as a framework in your strategic communication planning process.

**STRATEGIC PLANNING FOR INTERNAL COMMUNICATORS**

Melcrum’s Practitioner’s Guide to Strategic Planning for Internal Communicators walks you through a best-practice process for strategic planning, providing all the tools you need to go from concept to completion – and evaluation.

The guide is built around ROI Communication’s Strategic Communication Planning Process. This nine-step model tells you exactly how to approach each stage and supplies you with everything you need to get started.

As well as giving you the tools, this guide also features detailed instructions on how to carry out the specific tasks of strategic planning.

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Map the present situation

Ensure alignment with your organization’s business by understanding where it currently stands and where leaders want to take it. An expansive, agreed picture of the current state of the organization – how it looks and works – makes sure all major issues are covered. To capture this picture, ask your planning group to describe the current state of the organization and pool answers, grouping similar answers together and discussing them for clarity.

- One approach to determining the present situation might be to do a SWOT analysis of the organization. This analysis rates: Strengths; Weaknesses; Opportunities; and Threats faced by the business, considering internal and external factors.
- Undertake a communication audit to find out which activities are most effective and to streamline your communication; deliver clear recommendations on how to improve existing channels and make better investments with available budget.
- Ask your team to list all of the main tasks they currently perform as part of their job and assign a percentage estimate of how much of their working time they spend on each of those activities. Armed with the responses, create a survey for the leadership team; ask leaders to rate two statements on a scale of 1–5 (from “to no extent” to “to a great extent”):
  1. This activity is important to improving company performance.
  2. Its current performance meets my expectations.

This data will help you perform a gap analysis of importance versus performance – rooting out which tasks leaders say are the most important and how the team is performing against them. Mark out four categories of internal communication activity and determine where each principle activity fits:
- High importance–High performance.
- High importance–Low performance.
- Low importance–Low performance.
- Low importance–High performance.

Future state vision

Envision the elements of an idealized future – how you want the internal communication function to look, feel and operate a year from now. This offers specific details that all stakeholders understand and are more likely to support.

- Ask your key stakeholders to envision the future state of the organization: “Imagine it’s one year from now, and the internal communication function has been successful. What have we accomplished? What does success look like?”

- Get stakeholders to write down as many ideas as they can, putting each idea on a separate sticky note. Categorize ideas: Content, Tools and Channels, Structure, Processes, Leaders and Managers, Partnerships, Metrics, IC team, Reputation and Impact, Role, Global and Other. For each, group together similar sticky notes under three or four key themes.

Prioritize vision elements

Identify a handful of the elements from Step 3 that are most important to the business and function.

- Assess current performance to get a clear picture of the success of all key enablers, compared to their relative importance.
- Review grouped themes and separate out the enablers (activity that makes success possible) from the outcomes (end-result from the successful execution of that activity).
- Give each stakeholder 10 “votes” to vote on which enablers they think are the most important for achieving the desired outcomes. They may use their votes any way they choose, e.g. all 10 on one enabler. Count the votes and isolate 8–12 top enablers. Ask the group to rate these on two scales of 1–10:
  1. How successful are we today at achieving this vision element?
  2. How important is this vision element to achieving our desired outcome?

- Tally up and map the results on an importance–success quadrant grid [see Figure One].
- Pursue vision elements that appear in “Critical – Improve”, any elements that fall outside this category should be put aside. Collectively decide to take forward the top scoring elements (ideally three to six).
Develop actionable objectives

Turn the three to six vision elements into actionable objectives. Each should have specific “end points” (providing an indicator of success) and consider available human and financial resources, programs, products or services that must be allocated to achieve the goal.

- Simply saying “increase engagement” doesn’t provide enough specific direction to allocate resources appropriately, nor does it identify a timeframe or specify an audience: e.g. among all audiences or a specific demographic? Goals need to take into consideration where you are today and where you would like to be – and by when – so you can focus on closing that gap.
- Make sure each objective is SMART. It must be: Specific, Measurable, Attainable, Relevant, and Time-bound. An example of a SMART goal: “Increasing current engagement score of field-based employees to top quartile percentages by the end of fourth quarter, using a mix of non-wired channels”.
- Create project owners and assign individuals or groups to take responsibility for each of these objectives. Direct these people to do preliminary work on their given objective, developing a range of possible strategies and tactics to achieve it.

Develop and prioritize potential strategies and tactics

Create sub-teams and brainstorm a range of potential strategies to achieve each of these objectives, and a further range of tactics to support each strategy.

- Organize strategies into categories and consolidate similar suggestions. When critical mass is achieved on ideas, discuss the merits of each strategy proposed, e.g. which are most likely to work and which are most likely to face difficulties? Vote on the top 6–8 tactics for each objective and repeat the process to devise a range of tactics for each one.
- Decide collectively which strategies and tactics you’re going to pursue, providing consensus (and increased buy-in) and a clear direction for the designated time period.
- Go through the remaining final objectives and the individual strategies presented by the sub-team. Each participant is again given 10 votes to allocate to the strategies they think are the most important. Tally the results of the vote and arrive at an agreed 3–5 strategies for the main objectives. Talk through and arrive at an agreed 8–12 tactics for each strategy. Repeat with each of the remaining objectives.

Define metrics, timelines and responsibilities

Create the detail behind those strategies and tactics. Namely, how success will be measured, the timeframe and who will be responsible.

- Metrics: How will success on this strategy/tactic be measured? What is the desired outcome from the strategy/tactic?
- Timelines: When should it start and when should it be finished by? Which strategies/tactics are urgent because they have other strategies/tactics contingent on their completion?
- Roles, responsibilities and resources: Who and what is needed to ensure success? Who will be accountable for each element of its success?
- Conduct some baseline measurements to identify the levels of knowledge and attitude of key stakeholders. There are four different types of measurable objectives:
  1. Financial impact on organizational goals.
  2. Audience actions.
  3. Audience perceptions.
  4. Your communication activities.
- Through focus groups and manager interviews, identify what your target audience currently knows and what it needs to know/believe to execute those actions. Find out why employees aren’t doing the right things now – e.g. is it because they don’t know the facts or because they don’t want to do them?
- Ask employees what they would ideally like to know about a subject and how they wish to receive information. Ask executives what they believe employees should know. This helps identify what perceptions need to change to embed new behaviors and determines who needs to do what.
- Define intermediary metrics by agreeing points in a timeline (bimonthly, quarterly, etc.) to review your progress throughout the year using a traffic light system, for example: Green – continue on the planned path, Yellow – change course, Red – abandon completely.

Develop strategic and tactical plans

Consolidate the wealth of ideas your planning sessions have generated, and integrate into a document with clear responsibilities for your team and other stakeholders, for management review and approval.

- Work with stakeholders and team members to clarify the finer details of each part of the plan. Map the results into a clear, detailed strategic plan.

Implementation and beyond

It’s time to put the plan into action, but remember: Implementation is only the beginning of a long process of activity, measurement, re-evaluation and re-strategizing.

- Once the strategic communication plan has been launched, determine regular review cycles for all phases of the plan. Ideally, the plan should be reviewed in a group meeting once every quarter, assessing all elements of the plan and their outcomes. Change the plan, as necessary, according to these review cycles; also review and change the plan ad hoc in response to organizational changes, or strategic or competitor activities.
- Monitor timing; roles and responsibilities – evaluating individuals’ performance on the items in the plan for which they had responsibility; and metrics – did the chosen metrics provide useful measurements? If not, how might they be improved? If they did, what’s happened as a result? Consider whether some strategies need to be “frozen” temporarily to allow others to be prioritized.
- Pay particular attention to drawing out “road blocks” and highlight areas where the plan failed to deliver. Analyze what stopped individual strategies or tactics from being properly enacted (e.g. “ Couldn’t get management commitment/there were time constraints.”), including any hurdles that cropped up repeatedly and use that knowledge for forward planning.