Building an Outcome-Focused Communication Plan
OUTCOME-FOCUSED COMMUNICATIONS PLANNING

Who Should Use this Process: Communicators tasked with executing any communications project.

What It Helps You With: Partnering effectively with the business to create a thoughtful communications plan to drive business outcomes. By thinking through each step you will also have clear rationale for each decision.

How to Use This Process: Before you put the plan on paper and select communication channels or craft messages, follow the step by step guide to think through objectives of your plan (from both the business and communication perspective), and use the tools in each step to help you execute your plan and meet your objectives.

1. Uncover desired business outcome
2. Identify target audience(s)
3. Define communication objective
4. Deepen understanding of audience
5. Determine appropriate channels
6. Select outcome-focused metrics
7. Create one page action plan
8. Develop and execute messaging
9. Measure and report progress

Agreement on what you are trying to achieve and why
Understanding of what it will take to achieve your objective
Plan of who, what, how and when you are communicating
Dashboard showing impact of communication activities
COMMUNICATIONS PLANNING TOOLS

Establish Communication Objective
- Business Partner Conversation Template
- Audience Identification Guidelines
- Communications Goal Selection Tool

Understand Audience Motivations
- Audience Listening Guide
- Channel Selection Tool

Create Action Plan
- Objective-Based Metric Selection Process
- Communications Plan Template

Track and Report Progress
- Communications Tips and Tricks
- Objective-Based Reporting Dashboard

Agreement on what you are trying to achieve and why
Understanding of what it will take to achieve your objective
Plan of who, what, how and when you are communicating
Dashboard showing impact of communication activities
1. BUSINESS CONVERSATION TEMPLATE

Directions
- Start with business partner request and work with business to reframe the problem into a specific target objective.

Steps for Target Business Objective Identification

Step 1: Clarify Business Objective

**DO**
- Proactively discuss current business partner problem (Current State) and what they are trying to achieve (Ideal State)

**DON’T**
- Just take orders without understanding why
- Assume that the business partner has thought through the problem

Step 2: Root-Cause Business Problem

**DO**
- Brainstorm reasons why ideal state is not currently happening
- Push business partners to think from audience’s perspective and consider nonobvious reasons

**DON’T**
- Assume awareness and understanding of the objective will solve the problem

Step 3: Reframe Business Partner Request

**DO**
- Agree on target behavior that Communications can influence

**DON’T**
- Leave without consensus and understanding with business partners on the real target objective to solve for

Illustrative Example

Example: Business Partner Requests E-Mail Campaign to Boost Participation in Volunteer Event

<table>
<thead>
<tr>
<th>Current State</th>
<th>Ideal State</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee participation in volunteering is low (5%)</td>
<td>Increase participation in volunteering to 20%</td>
</tr>
</tbody>
</table>

Example: Communicator and Business Partner List the Various Reasons Why Employees Don’t Join Volunteer Programs

Redefined Problem
- Why? Employees not engaged—don’t see why participate in volunteering
- Why? Employees not recognized or rewarded for participating
- Why? Managers send signals that volunteering is not a good use of time

Example: Communicator and Business Partner Determine That Managers Are Inadvertently Discouraging Participation

Target Objective

**Original Business Request:** Campaign on volunteering event

**New Target Objective:** Partner with managers to demonstrate the importance of volunteering
2. AUDIENCE(S) IDENTIFICATION GUIDELINES

Directions
- Start with the target objective identified in Step 1 from the reframed business problem (e.g., Get managers to encourage employees to participate in volunteering)
- Then, understand other influences in the end audience’s network for a full picture of whose behaviors you need to change and other audience members to focus on (i.e., who and what is involved in end audience’s decisions)

One Way Hierarchical Communication

“Networked” Communications Focus

DON’T
- Assume that going direct to the target audience is the only and best way
- Neglect other relevant audience influencers (e.g., peers; internal or external social networks, leaders, etc.)

DO
- Speak to your audience and understand where they go for information and who typically influences their behavior or ideas
- Identify already established audience networks that you can leverage and influence (e.g., tap into manager peer networking group)
3. COMMUNICATIONS GOAL SELECTION TOOL

Directions
- Start with the audiences defined in Step 2 from the reframed business problem.
- Decide what you want each of your target audiences to do as a result of your communication. Do you want them to think, feel or do something based on the messaging? The objective with each audience may well be different.
- Your communications strategy (channel and message) will be very different depending on what the objective of the communication is.

Communication Objective Options

<table>
<thead>
<tr>
<th>Objective</th>
<th>Purpose</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Know</td>
<td>Create awareness around a particular initiative</td>
<td>Inform employees about company financial results</td>
</tr>
<tr>
<td>Think</td>
<td>Build consensus around new projects</td>
<td>Build the company brand as a thought leader with key stakeholders</td>
</tr>
<tr>
<td>Feel</td>
<td>Build an emotional connection between stakeholder and company</td>
<td>Build employee pride in the company’s corporate responsibility</td>
</tr>
<tr>
<td>Do</td>
<td>Drive a specific audience behavior</td>
<td>Employee enrollment in new benefits scheme</td>
</tr>
<tr>
<td>Share</td>
<td>Empower employees to talk to their own networks about something</td>
<td>Stakeholders defend the companies position on an issue</td>
</tr>
</tbody>
</table>

What This Tool Helps You With: Helps focus the communication objective. Always attempt to limit the number of communication objective.

How to Use This Tool: Think through the different objectives for each stakeholder by assessing the purpose of the communication.

Benefits of Using This Tool: Helps the communicator be more effective in their communication. A focused objective is measurable and easy to execute on.
4. AUDIENCE LISTENING GUIDE

**Directions**
- For each of your target audience you will need to get a better understanding of what they currently think. This will help you to focus in on the content and style of communication required.
- You may want to combine multiple methods depending on the level of existing audience understanding.

<table>
<thead>
<tr>
<th>Methods</th>
<th>Resource Intensity</th>
<th>Best Used For</th>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leverage Existing Relationships</td>
<td>Low—Time to reach</td>
<td>Getting the “inside scoop” on a particular challenge</td>
<td>Honest feedback, Credible source, Quick to get sense of situation</td>
<td>No formal data, Skewed sample, Limited to scope of your existing relationships</td>
</tr>
<tr>
<td>for Knowledge</td>
<td>out and speak to</td>
<td>Short cutting to potential problem areas for further investigation</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>people and gain</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>their understanding</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>of the situation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seek Existing Business Insight</td>
<td>Medium—Identify</td>
<td>Shared challenges across multiple functions (i.e., employee engagement,</td>
<td>Reliable and accessible information, Easy to create buy-in</td>
<td>Data/insight may only show one perspective on the problem</td>
</tr>
<tr>
<td></td>
<td>existing data/insight within the business. Some effort required to find and translate information to your needs</td>
<td>workforce productivity, and safety)</td>
<td>based on internal data</td>
<td></td>
</tr>
<tr>
<td>Quantitative Surveys (Data</td>
<td>Low—Quick poll of sample group with simple descriptive data</td>
<td>Getting a high level understanding of the challenges of a large group</td>
<td>Access to large amounts of data, Objective insight, Evidence for business cases</td>
<td>Identifies symptoms not causes, Need time and expertise to create</td>
</tr>
<tr>
<td>Collection)</td>
<td></td>
<td>Focusing in on problem areas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Focus Groups</td>
<td>Medium—Time to set select participants and run sessions. Groups should consist of 12–15 people</td>
<td>Understanding the reasons behind a particular behavior, Brainstorming potential solutions, Gut checking multiple potential options</td>
<td>In-depth understanding of audience, Flexible to go deeper if something interesting comes up</td>
<td>Moderator biases, Time and effort intensive, No formal data</td>
</tr>
<tr>
<td>Social Media Monitoring</td>
<td>Medium—Informal monitoring of known sites</td>
<td>Understanding unprompted stakeholder perspective on key issues, Identifying key influencers</td>
<td>Easy access to stakeholder point of view, Can get proof/data showing stakeholder views</td>
<td>Sheer volume of information can be overwhelming, Potential distraction by “noise”</td>
</tr>
<tr>
<td></td>
<td>High—Comprehensive monitoring with analysis by third party</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Observation/ Ethnography (</td>
<td>High—Time intensive to spend time shadowing individuals in target audience</td>
<td>Understanding how target audience behaves and thinks, Uncover “hidden,” assumptions, consumption patterns, and motivations</td>
<td>True picture of audience behavior, Get a holistic picture of the TA-behaviors, context et al</td>
<td>Time intensive, Requires skills/practice (or a vendor)</td>
</tr>
<tr>
<td>Shadowing Individuals)</td>
<td></td>
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</tr>
</tbody>
</table>

**Identify the appropriate listening method to gain a deeper understanding of your target audience.**

- **What This Tool Helps You With:** Help the communicator make a choice around how much effort they wish to put in to understand their audience.

- **How to Use This Tool:** Choose the “listening” tool based on the resource intensity. Choice of tools to understand stakeholder will vary by the time at hand and budgets.

- **Benefits of Using This Tool:** Develop a stakeholder centric communication, that will be more effective in delivering on communication objective and not an “isolated” communication.
### 5. CHANNEL SELECTION TOOL

#### Directions
- Start with the purpose of your communication and your understanding of the audience as determined in steps 3 & 4
- Then, based upon this information choose a channel best suited to your objectives

<table>
<thead>
<tr>
<th>Channel Selection Guide</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Channel Type</strong></td>
</tr>
<tr>
<td>Central communications (one to many)</td>
</tr>
<tr>
<td>Leader Presentation (one to many)</td>
</tr>
<tr>
<td>Manager Cascade (one to few)</td>
</tr>
<tr>
<td>Manager dialogue (interactive)</td>
</tr>
<tr>
<td>Mobile and Social Media Updates (one to many)</td>
</tr>
<tr>
<td>Social Media Participation (interactive)</td>
</tr>
<tr>
<td>Enabling Advocates (many to many)</td>
</tr>
</tbody>
</table>
6. OBJECTIVE-BASED METRIC SELECTION PROCESS

### Directions
- In order to link Communications activities to business outcomes you must measure at four different levels: 1) Final Business Outcome 2) Objective of Communication 3) Audience Attitudes 4) Communications Activity

### Return on Objective (ROO) Approach: Linking Business Outcomes to Activity Metrics

<table>
<thead>
<tr>
<th>Business Metrics</th>
<th>Communication Metrics</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business Metrics</strong></td>
<td><strong>Behavioral Metrics</strong></td>
</tr>
<tr>
<td>- Sales</td>
<td>- Engagement indicators</td>
</tr>
<tr>
<td>- Customer loyalty</td>
<td>- Referrals</td>
</tr>
<tr>
<td>- Efficiency (speed/cost of production)</td>
<td>- Word of Mouth</td>
</tr>
<tr>
<td>- Employee productivity</td>
<td>- Return visits/downloads</td>
</tr>
<tr>
<td>- Growth in specific markets</td>
<td>- Level of participation</td>
</tr>
</tbody>
</table>

### Step 1
Define the metrics that will measure the business outcome

### Step 2
Define metrics that measure the pre-agreed objective of the communication

### Step 3
Metrics to capture attitudes you hope to achieve through communications activity

### Step 4
Metrics that will measure the communications activity through chosen channels
7. ACTION PLAN TEMPLATE

**Directions**
- After establishing the “who, what, how” and the best metrics for your objectives (steps 1–6), input that information into a one-page action plan that you can take to business partner and get buy-in
- Before executing on the plan, ensure agreement on outlined steps and that all parties are happy to proceed with plan

<table>
<thead>
<tr>
<th>Business Objective (Step 1)</th>
<th>Target Audience (Step 2)</th>
<th>Communication Objective (Step 3)</th>
<th>Activity Channel (Step 5)</th>
<th>Owner(s) and Timelines</th>
<th>Metrics (Step 6)</th>
</tr>
</thead>
<tbody>
<tr>
<td>What business objective are you supporting with this communications activity?</td>
<td>For that business objective, who is the target audience(s) you need to consider and influence?</td>
<td>For your selected business objective, what do you want target audience to DO, THINK, REMEMBER and/or TELL OTHERS?</td>
<td>What tactics or activities will you pursue?</td>
<td>What is the best channel for achieving your desired objective?</td>
<td>Who is responsible for owning this activity? What’s the target date for completion? How will you measure the success of your activity and link it to your objective? In what time frame?</td>
</tr>
<tr>
<td></td>
<td>Primary Audience</td>
<td>Influencer 1</td>
<td>Influencer 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

Ensure the business partners are in agreement with the outcome-focused action plan before executing.

- **What This Tool Helps You With:** Ensure alignment on action steps to achieve business objective before executing communication.

- **How To Use This Tool:** Use the outcomes from steps 1–6 to populate this template with the different parts of the action plan.

- **Benefits of Using This Tool:** Business partner buy-in on plan before executing activities.
### 8. COMMUNICATION EXECUTION TIPS

**Directions**
- After getting buy-in on action plan, depending on the selected channel, either execute yourself or support business partners in executing communication.

#### Three Roles for Communications in Messaging Development and Execution

<table>
<thead>
<tr>
<th>Create Messaging</th>
<th>Enable Others to Communicate</th>
<th>Participate in Existing Conversation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Communications’ Goal:</strong></td>
<td><strong>Communications’ Goal:</strong></td>
<td><strong>Communications’ Goal:</strong></td>
</tr>
<tr>
<td>Create outcome-focused messages/communication.</td>
<td>Coach the person who is leading the communication.</td>
<td>Facilitate continuous information sharing and exchange through existing networks.</td>
</tr>
<tr>
<td><strong>Tips for Execution:</strong></td>
<td><strong>Tips for Execution:</strong></td>
<td><strong>Tips for Execution:</strong></td>
</tr>
<tr>
<td>□ Start with the business outcome you are trying to achieve (refer to Step 1 of this toolkit)</td>
<td>□ Coach managers and leaders on how to conduct dialogue sessions</td>
<td>□ Monitor what stakeholders are saying about your company through various channels</td>
</tr>
<tr>
<td>□ Center the messaging around that key outcome</td>
<td>□ Give step by step guides to help managers plan dialogue activities</td>
<td>□ Establish guidelines for responding to online criticism</td>
</tr>
<tr>
<td>□ Engage audience with messages that trigger emotional connections</td>
<td>□ Teach managers how to be quality listeners and engage employees in the dialogue</td>
<td>□ Provide safe forums for stakeholders to provide feedback and criticism</td>
</tr>
<tr>
<td>□ Teach employees to be spokespersons</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Additional Tools and Resources:**
- 7 Ways to Write in a More Engaging Way
- Workshop: Writing for Impact
- Manager Dialogue Training and Workshops
- Create Content for Flow
- Rules of Engagement One-Pager
- Communicate About Challenging Issues
- Tips for Engagement

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Regardless of Communications’ role in message execution, messaging should center around outcomes.

- **What This Tool Helps You With:** It helps you focus your messaging on business outcomes and desired objectives.
- **How To Use This Tool:** Consult the tips and additional tools to write for impact or coach business partners how to effectively execute communications.
- **Benefits of Using This Tool:** Outcome-focused messaging.
Design dashboards based on the metrics identified through the ROO approach, to easily link results to business outcomes.

- **What This Tool Helps You With:** Easily track metrics that link to business outcomes established in previous steps of the process.

- **How To Use This Tool:** Use the template to set up your own dashboard—take the objective-focused metrics outlined previously to populate this template.

- **Benefits of Using This Tool:** Direct correlation between communications results and business objectives.

## 9. MEASURE AND REPORT PROGRESS

### Directions

- Start with the purpose of your communication and your understanding of the audience as determined in steps 3&4
- Then, based upon this information choose a channel best suited to your objectives

### Principles of Leading Dashboards

- **Design with the Objective in Mind:** Emphasize the link between the metric, the associated communication objective, and the business objective.
- **Limit the Amount of Information:** Use a principled selection process to include only highly relevant metrics and protecting users from the challenge of extracting insights from an excess of data.
- **Provide a Frame of Reference:** Ensure each metric answers the question “compared to what?” Compare metrics to a benchmark and assess relative performance to help users identify trends over time.
- **Use an Intuitive and Visual Scoring System:** Include a simple scoring system—such as the widely employed “stop light” approach of red, yellow and green—to clearly indicate whether or not goals have been met.

### Objective-Based Dashboard Template

<table>
<thead>
<tr>
<th>Business Objective</th>
<th>Activity Metric</th>
<th>Goal</th>
<th>Benchmark</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communications’ Objective 1</td>
<td>Communications Activity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communications’ Objective 2</td>
<td>Communications Activity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communications’ Objective 3</td>
<td>Communications Activity</td>
<td></td>
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</tr>
</tbody>
</table>

Check out other examples of Communications Dashboards and Reporting designed with a ROO approach.

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