



# THE SPITFIRE STRATEGIES SMART CHART FOR COMMUNICATIONS

A Tool to Help Nonprofits Make Smart Communications Choices



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The Smart Chart was created for the Communications Leadership Institute by Spitfire Strategies.

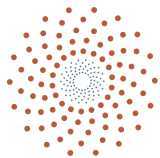
Spitfire Strategies provides strategic communications solutions to promote positive social change. Our goal is to help social change organizations use their voice in a strong, clear and compelling way to articulate their vision of a better world. To learn more about Spitfire Strategies, or download additional copies of the Smart Chart, visit our web site at [www.spitfirestrategies.com](http://www.spitfirestrategies.com).

Spitfire Strategies wishes to thank the many people who helped bring this publication to life.

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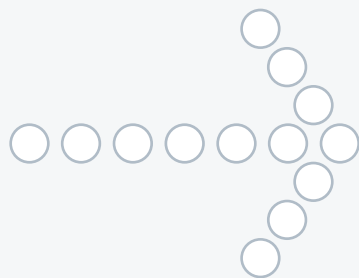
## A Tool to Help Nonprofits Make Smart Communication Choices



Whether you are just starting the communications planning process, checking in on a communications campaign already in progress, or interested in reviewing an effort you have already executed, the Smart Chart can help you assess your strategic decisions and ensure your communications plan delivers high impact.

Strategic decisions must be made before you choose your tactics such as holding a press conference, launching a website, etc.. Fight the urge to think tactically. The tactics will become obvious once you've made sound strategic decisions. Remember: in a good communications plan, strategy drives tactics -- not the other way around.

This chart will help you make and assess the strategic communications decisions that are the building blocks of any successful communications planning and implementation effort. When used correctly, this chart will ensure better outcomes and help you use resources more effectively.



### → How it works.

(See pages 8-9 to view the chart referred to below)

This process is not rocket science, but it requires a time commitment and a focus to complete successfully. Building consensus among campaign partners around the decisions you need to make is not always easy. But it is necessary. Abdicating decisions will lead to less effective communications campaigns and efforts.

### → The chart features three major sections.

1. The three guiding points.
2. Constraints and parameters that may influence your course of action.
3. Strategic decisions necessary to build a strong foundation for the communications plan.

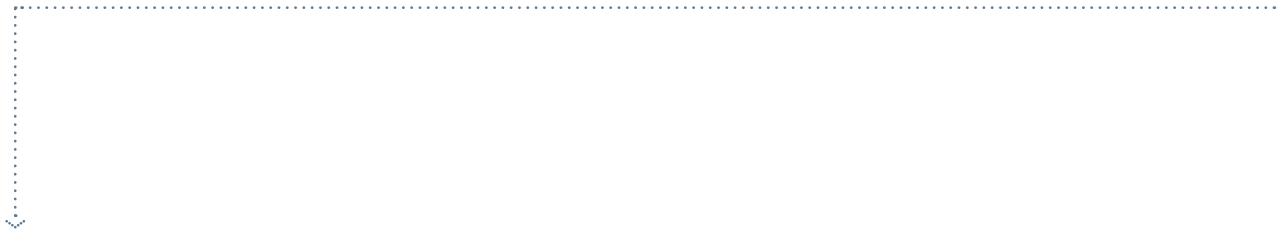
### → Go in order.

To make the most of your strategic decisions, you need to make them in proper order – 1-2-3. (Sections are clearly numbered to help you follow this format.) For instance, you must set your goal before you decide on a decision maker. If you don't have a goal, how will you know who ultimately will make the decision that helps you achieve your goal? Audience must come before message – how will you know what to say if you don't know who you are talking to? You get the idea.



## SECTION ONE: THE THREE GUIDING POINTS — GOAL, DECISION MAKER, MEASUREMENTS OF SUCCESS

Lewis Carroll said “if you don’t know where you are going, every road leads you there.” The good news is you do know where you are going. Start from your organization’s mission, and from that mission decide what programs and initiatives to run. Communications can help you achieve your mission. These three guiding points will keep you on track: goal, decision maker, measurements of success. They are the navigational stars that will guide your strategic communications decisions and plans. They are fixed points. Never lose sight of them. They are the key to having a high-impact communications program.



### 1 What are you trying to do? YOUR GOAL

A well-defined goal is THE MOST important component of a good plan. If the goal is too broad, the decisions made from this point on will be vague, virtually guaranteeing an ineffective campaign. Communications plans support an organizational mission, but there is a difference between mission and goal. Your goal is not your mission. Your goal is the next step in your overall plan for achieving your mission. This goal must be measurable and should represent a definitive plan of action. Raising awareness is a hard goal to measure. You could do a poll before your campaign and after your campaign and find out lots of people are aware of your campaign, but didn’t change their behavior or take action. Why do you want to raise awareness? Do you want to pass a bill, change consumer behavior, or decrease the cost of immunization shots? State a specific goal, and then mark down how you are going to measure your progress towards this goal. To reach a goal through strategic communications, the goal must be obtainable. “Stopping global climate change” and “saving the children” are certainly worthy aspirations, but they are missions, not goals. Reducing auto emissions by five percent and providing quality health care to all children are achievable goals.

Goals largely can be divided into two categories: behavior change or policy change (which can mean government or corporate policy). These are two dramatically different goal types. Your organization may choose to pursue both types as part of a campaign. If that is the case, you should complete a separate chart for each goal since it is very likely that the decision makers, audiences, and messages for each type will be quite different. It is fine to have different plans as long as they do not contradict each other.

Mission	Goal
Save the children	Every child has access to quality health care
Save the environment	Reduce auto emissions by 5%
End foodborne illnesses	Establish a single federal agency that oversees food safety
End cervical cancer	Get the top 200 best companies for women to work for to distribute educational materials to their employees about screening
Abolish the death penalty	Provide DNA testing to every person accused of murder

1 GOAL		2 DECISION MAKERS	3 MEASUREMENTS OF SUCCESS	
Reduce mistakes in death penalty system by increasing access to DNA testing and qualified counsel.		Federal policymakers on judiciary committee.	Educate Judiciary Committee members about problem; build documented bi-partisan support for reform;	
Decisions to Make	Choices	Decision	Rationale	Reality Check

Example of Tool

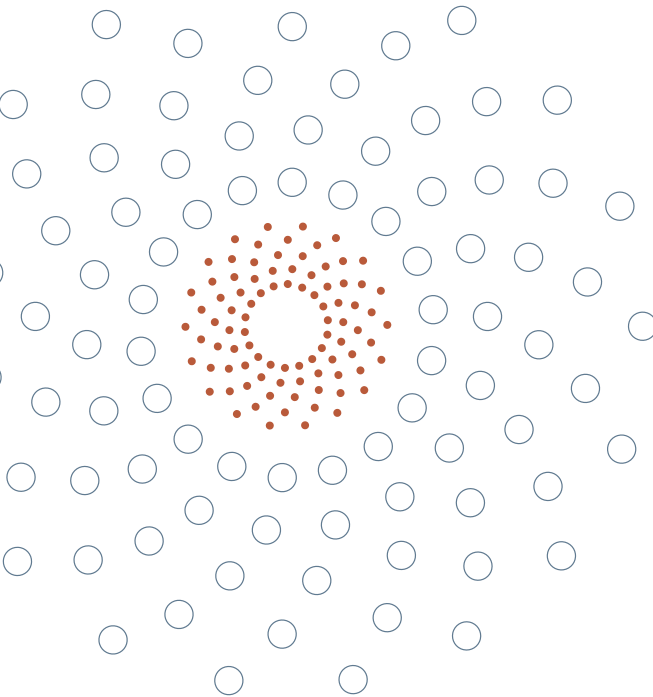
→ **2 Who makes your goal a reality?**  
**DECISION MAKERS**

Identifying the decision maker you are ultimately trying to reach is critical. It will guide you in making choices about who your target audiences are. If your goal is to change behavior, the decision maker may be a specific consumer group (i.e., people who buy certain commodities may be the decision maker in a campaign to promote products with the fair trade label). If your goal is to impact a corporate policy, the decision-maker may be the head buyer or CEO of a company that can choose to offer the fair trade label in its stores. If the goal is city, state or federal policy, your decision maker may be an elected official or an appointed staffer. Whoever ultimately votes for a policy is a decision maker. Figure out who can ultimately help you achieve your goal. Then, later in the audience targeting section, you can decide if you are going to approach the decision makers directly, or if you will reach them through the people they listen to most. Your organization may not have immediate or direct access to the decision maker(s). But once you have identified who you ultimately need to influence or activate, you can then figure out how to do this.

→ **3 How do you know what you are doing is working?**  
**MEASUREMENTS OF SUCCESS**

One good way to make sure that your goal is specific enough and actually achievable is to chart how you will measure your progress. What are quantifiable and anecdotal ways you are going to measure success? This can be a mix of outputs and outcomes. One output might be generating more news articles carrying your key messages in outlets that reach your target audience. One outcome might be that your target audience saw the news coverage and, based on the coverage, invited your organization to testify at an upcoming hearing (if you have a policy goal) or purchased products you are promoting (if you have a behavior goal).

Measurements need to be defined and reviewed throughout the communications program. Don't wait until the end. The whole point is to make sure you are getting your messages to the right audiences and getting those audiences to do what you want. If this isn't working you want to know ASAP. Revision is a reality of communications efforts. Don't be afraid to review and reconfigure campaigns. This is smart to do and charting measurements of success can help.



## SECTION TWO: CONSTRAINTS AND PARAMETERS

In the next section, you will make choices about how you are going to use your three guiding points – Goal, Decision maker, and Measurement of Success – to create and implement an effective communications program. You are operating within parameters that will affect the decisions you make. To keep these in mind and create a communications plan that is doable within your organizational constraints, compile a list of **CONSTRAINTS AND PARAMETERS** to consider as you make your decisions. These may include financial resources, funder requirements, staff resources, other campaigns or organizations already operating in your space and research findings – anything that will influence your decisions and may impact your ability to implement your plan. Write your list on the left side of the chart so that you are reminded of these constraints and parameters throughout the planning process. Consider these as you move on to section three and start making decisions.



## SECTION THREE: STRATEGIC DECISIONS

Now that you have your guiding points to keep you on track, and your constraints and parameters to consider, you can make the key strategic decisions that will provide a strong foundation for an effective communications plan.

As you look at the decision chart, you will see each “decision to make” is followed by several boxes: choices, decision, rationale, and reality check. For every decision to make, you will likely be able to identify several choices – some you will pursue, others you may not. The important thing is to realize that when you are deciding among your choices, you are doing just that, making a choice. There is no right or wrong answer. There are many possible directions you may take, most of which will eventually lead you to your goal. The question is: which are the best options for your organization?

Obviously, the choices you make here will dramatically affect your future decisions. Review the Constraints and Parameters you wrote down in the beginning and, keeping these in mind, make the best choice(s) for you in each of the decisions boxes. **BE CONSISTENT.** If you make one choice and then contradict it later, you will have a less effective communications plan. For example: if you decide to target senior citizens, Britney Spears may not be your best messenger. Or if you decide to target teens to conserve energy, don’t lead with a message that appeals more to their parents, e.g., their utility bills will go down.

After you list all your possibilities in the **CHOICES** column for each decision row, and evaluate each of these choices against your **CONSTRAINTS/PARAMETERS** and **GOAL**, select the best option(s) and write it/them in the **DECISION** column. Then, in the **RATIONALE** column, write down why. Note: the rationale is never “a hunch.” Why do you have a hunch? What information are you considering that makes you feel this is the right choice? You don’t need to have hard-core research underlying each decision (although that’s not a bad thing). You do need to have a well-thought-out, defensible rationale. Flipping coins or conferring with magic eight balls or Ouija Boards doesn’t count.

The last box after each decision is the **REALITY CHECK**. This box is already filled in for you and provides some general guidance to help you evaluate each decision before moving on to the next.

On to the categories of strategic decisions. There are three: Audience, Approach, and Message.



# 1

## Decision One: AUDIENCE

There are two decisions to make here. The target(s) and the value you are going to tap to resonate with the target(s).

You can list and pick several target audiences. However, the more clearly you define your audience, the more strategic you can be about reaching that audience. For audiences, your CHOICES may include urban males under 25, suburban soccer moms, businessmen who travel frequently or family farmers. You can see that each of these audiences is dramatically different.

If, after reviewing all your audience choices, you make a DECISION to target urban males under age 25 because you already have a lot of research about this demographic as well as specific access points, then under RATIONALE write, “extensive data available” and “easily accessible.”

Do not target the general public. First of all, the general public means everyone, and thus you have failed to target anyone. Secondly, it will be impossible to find generic messages that resonate with everyone. The result will be watered down messages that don’t move a soul, particularly in a congested marketplace of ideas. You must target a specific, definable audience. For example, the Don’t Mess with Texas campaign ultimately decided to target male Texans under 25.

### Part two of audience: Values and core concerns

Once you have determined what audience you will target, you need to figure out what will compel that audience to move toward your goal. What can you do to tap into one of their existing thoughts or beliefs to get them to support your ideas? Remember: this is about their values system, not yours. You cannot assume that if people know what you know, they will do what you would do. Many people know that big cars have high emission levels, but they

choose to drive them anyway. Perhaps big cars make them feel safer. Perhaps smaller cars do not provide them with enough cargo space. If you want to connect with your target audience and make them your allies, you need to understand how they think and determine what lens they use to make decisions. It is always easier to tap into a value someone already holds than to create a new one.

For example, the Justice Project, which works to reform the death penalty system, identified a policy goal: reduce mistakes in the death penalty system by providing DNA testing and qualified counsel. They then targeted federal policymakers – specifically members of the House and Senate judiciary committees – who could help reach their goal. They needed to find a way to persuade the committee members to side with them. Research showed that neither the economic argument (execution costs more than life-time imprisonment) nor race statistics (minorities are more likely to receive the death penalty) were compelling enough to sway their audience. The moral argument – that it is wrong to kill innocent people – also failed to move people in the direction they wanted to go. In the end, the groups found that the best way to persuade their target audience was to focus on innocence. The majority of their target audience agreed innocent people should not be sentenced to death. Armed with statistics showing an increasing number of people being exonerated from death row, the groups were able to appeal to a value their audience already had (it is wrong to kill innocent people) and start a conversation about how to keep wrongful convictions from happening. And at this point, reform became possible.

You may identify numerous persuasion possibilities to list in your CHOICES box. Once you’ve made your list, review your goal and target audience as well as your CONSTRAINTS AND PARAMETERS, then make a DECISION. Don’t forget to list your RATIONALE.



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## Decision Two: STRATEGIC APPROACH

Strategic approach is frequently confused with tactics. The strategic approach is the big picture. Tactics are the lines you use to draw the picture.

Let's pretend your goal is to get your mother to like you better than your sister (a goal that can be measured by the number of phone calls you each receive from your mother in a given week, i.e., a behavior change). Your target audience is your mother. You know your mother can be persuaded if you tap into the fact that she's tired and needs some pampering.

From a strategic standpoint, you can approach your mother in several ways. If your strategy is to provide extra help around the house, then your tactics might be weeding the garden, changing the sheets and dusting the furniture. Another strategy might be a smear campaign against your sister – at this point your tactics become repeating all the mean things she has ever said about your mom and reminding mom of all the trouble she has caused, leading to your mother's fatigued state.

You can see that the appropriate tactics are dramatically different for each strategic approach.

Now for a real world example. In the anti-smoking campaigns, a number of strategic approaches have been used. One approach is to make big tobacco THE BAD GUY. The Truth campaign does this by showing kids how they are being manipulated by big tobacco. The Campaign for Tobacco Free Kids exposed the marketing plans to make cigarettes appealing to kids. Both of these chose the strategic approach of making tobacco the bad guys.

Another approach is to VILIFY SECOND HAND SMOKE. Gasp.org is very aggressive and runs creative campaigns that say, "Smoking hurts babies," and, "You smoke, I choke." The

Breathing Spaces "Take it outside campaign" is softer and asks parents to protect their children, and rather than stop smoking altogether, at least take it outside so as not to expose the child.

A last approach has been to disregard the health consequences of teen smoking and focus on how smoking makes teens LESS ATTRACTIVE. Smoking is Ugly is an effort by Christy Turlington to show teens how ugly smoking makes them look. A number of teen Internet sites highlight statistics that show teen smoking makes you smell, is grosser than picking your nose, and gives you bad breath.

Three different strategic approaches: make tobacco the bad guy, vilify second-hand smoke, and show how smoking makes you less attractive. All might work. But each dictates very different messages and messengers.

List all your strategy CHOICES. Pick the strategic approach that you think will work best, and then use the tactics that best support that strategic approach.

You may find you have more than one strategic approach to enter into your DECISION box. Sometimes you need to make two levels of strategic decisions to hone your communications effort. Looking at the death penalty example again, once reform advocates decided to focus on innocence, they needed to determine who or what to make responsible for the fact that innocent people were being wrongfully convicted – a person or "the system." They decided to go with the system because it was more consistent with their overall goal. Their RATIONALE was that if people were to blame, those people could be replaced without changing the system. But, if they could show the system was broken, then they could push for system-wide reform.



### 3 Decision Three: MESSAGE AND MESSENGER

Creating messages for your campaign requires two decision points. First, you need to figure out what the key messages are. Then, you need to determine who will deliver this message.

By now you know who you want to reach, how you might persuade them, and what strategic approach you will take. Now you need to decide what to say. Again, it is important to consider your audience's values system, not your own. Review the persuasion points you identified above. Keep in mind these words of wisdom: It's not what you want to tell them, it's what they can hear.

For an anti-litter campaign in Texas, campaigners targeted young men who didn't really care about the environment or littering – but did carry enormous pride when it came to the Lone Star state. Keeping this value in mind, campaigners built messages that focused on state pride rather than littering. Don't Mess with Texas became a rallying cry about Texas rather than litter, and was ultimately an enormously successful campaign.

#### Part two of message: The messenger

Who delivers your message is just as important as what you choose to say. The right message delivered by a messenger with no credibility with your target audience will likely fall on deaf ears. For the Give Swordfish a Break campaign aimed at securing a swordfish recovery plan to help plummeting stocks, organizers determined that environmentalists alone were not the most effective option for reaching decision makers within the federal government nor for activating a new segment of the public to pressure government.

Through research, organizers found that seafood consumers listen to and trust food purveyors – and especially chefs – with information about what they should or should not eat. Similarly, chefs had strong credibility with government decision makers as a new voice of expertise in the debate because many could report from firsthand experience that the size of swordfish at docks and fish markets had declined over the years. The media – given an explosion of chef TV shows and the celebrity chef craze – also found chefs an interesting voice. Chefs had the credibility the campaign needed. They resonated with the target audience and became highly effective spokespeople. Environmentalists alone could not have delivered the same message and had the same impact. Don't forget to review and revise. Communications plans are meant to be adjusted to increase impact.

Ready, Set, Go...

Now it's your turn. Evaluate an upcoming, current or recent communications campaign by using the Smart Chart to plot your strategic decisions and evaluate your choices and rationale. Be sure to check your decisions against the rules of thumb listed for each in the REALITY CHECK box.

Important reminder: complete the chart in order. Each decision you make will affect all the rest of your choices and decisions. Review your rationale. Once you have a strong foundation, then and only then can you move on to how to get your messages to the right audience(s) through effective implementation. That's right, NOW its time for tactics.

*Good luck and have fun.*

[View Sample Tool](#) 

Note: This guide highlights examples of organizations that have used communications to educate segments of the public as well as policymakers. You should be clear that communications efforts that involve specific legislation could constitute lobbying and must be accounted for according to lobbying laws that govern 501(c)(3) activity. The examples in this guide are only to illustrate points and are not intended to advocate for specific legislation.



# THE JUSTICE PROJECT

## CONSTRAINTS AND PARAMETERS

- limited budget
- lobbying restrictions
- morality as a message doesn't test well
- tough on crime stance could be a problem
- people support the death penalty

## 1 GOAL

Reduce mistakes in death penalty system by increasing access to DNA testing and qualified counsel.

### Decisions to Make

### Choices

#### Audience target

- Policymakers
- Prosecutors
- Juries
- Judges

#### Values and Core Concerns

- Don't want to seem soft on crime
- Morally, many support
- Concerned about mistakes in system

#### Approach

- Innocence
- Economics
- Race
- Make someone responsible for mistakes
- Make system responsible

#### Messaging / Message

- Innocent people are being wrongfully convicted
- Stop the death penalty until mistakes are fixed

#### Messengers

- People in the system, e.g. judges, etc., but not "defenders"
- People who've been hurt by the system
- Advocates for abolition
- Public defenders

## 2 DECISION MAKERS

Federal policymakers on judiciary committee.

## 3 MEASUREMENTS OF SUCCESS

Educate Judiciary Committee members about problem; build documented bi-partisan support for reform; change debate from "if" there's a problem to "what to do about it;" increase media coverage of message that system is broken; get federal bill introduced and passed; states to follow lead.

Decision	Rationale	Reality Check
<ul style="list-style-type: none"> <li>• Policymakers</li> </ul>	<p>Laws are quickest way to reform versus jury by jury, judge by judge, etc.</p>	<p>Should not be general public or anything similar. Must be segmented. Should be the person/people who can most help you achieve your goal. Only when you figure out who this is, can you figure out how to reach them.</p>
<ul style="list-style-type: none"> <li>• Focus on mistakes not morality</li> </ul>	<p>Mistakes can be fixed. Moral beliefs are tough to change.</p>	<p>What do they believe? Did you answer these two questions before choosing your audience: what do they believe that you can tap into, &amp; what do they believe that you have to overcome?</p>
<ul style="list-style-type: none"> <li>• Innocence</li> <li>• System</li> </ul>	<p>Majority don't think innocents should be wrongfully convicted. Systems can be reformed. A few bad apples doesn't require reform.</p>	<p>Do not go straight to tactics. Consider big strategic decisions first. These will dictate tactics.</p>
<ul style="list-style-type: none"> <li>• Innocent people are being wrongfully convicted</li> </ul>	<p>Using the death penalty until mistakes are fixed doesn't reinforce value of need to protect innocent people.</p>	<p>Big difference between mission &amp; message. Mission is what you are about. Message is about resonating with your audience based on their beliefs &amp; values. Avoid MEGO phrases (my eyes glaze over).</p>
<ul style="list-style-type: none"> <li>• People in the system, e.g. judges, etc., but not "defenders"</li> <li>• People who've been hurt by system</li> </ul>	<p>Need to have people "in the know" but not obvious sympathizers to promote as mainstream position.</p>	<p>People listen to people, not institutions. This is about who your audience can hear, who is credible to them. Sometimes you can have the right message but the wrong messenger delivering it. Result: fewer people listening to what you have to say.</p>



# THE SPITFIRE STRATEGIES SMART CHART

<b>CONSTRAINTS AND PARAMETERS</b>	<b>1 GOAL</b>	
	<b>Decisions to Make</b>	<b>Choices</b>
	<b>Audience target</b>	
	<b>Values and Core Concerns</b>	
	<b>Approach</b>	
	<b>Messaging / Message</b>	
	<b>Messengers</b>	

**2 DECISION MAKERS**

**3 MEASUREMENTS OF SUCCESS**

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**Decision**

**Rationale**

**Reality Check**

		Should not be general public or anything similar. Must be segmented. Should be the person/people who can most help you achieve your goal. Only when you figure out who this is, can you figure out how to reach them.
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		What do they believe? Did you answer these two questions before choosing your audience: what do they believe that you can tap into, & what do they believe that you have to overcome?
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		Do not go straight to tactics. Consider big strategic decisions first. These will dictate tactics.
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		Big difference between mission & message. Mission is what you are about. Message is about resonating with your audience based on their beliefs & values. Avoid MEGO phrases (my eyes glaze over).
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		People listen to people, not institutions. This is about who your audience can hear, who is credible to them. Sometimes you can have the right message but the wrong messenger delivering it. Result: fewer people listening to what you have to say.
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