

# How to create an 8-Step Strategic Communications Planning Matrix

By Mandy Audette

Becoming a trusted advisor to your clients is one of the best ways to build your writing career and your income. It only makes sense. If you are involved in creating the marketing strategy you will be more valuable to the client than you are if you are simply completing writing projects.

In an effort to make the transition from writer to strategic advisor, I started to pursue my Master's Degree in Strategic Communications from Penn State. During one of the classes we're learning how to use a powerful planning tool that can help you plan and organize all the moving parts of a complex strategic communications plan. It's called the 8-Step Strategic Communications Matrix.

In this article, I will walk you through the process of putting the communications matrix together so that you can offer planning services to your clients.

The eight steps of the planning matrix are divided into four categories: research, action planning, communication and evaluation.

## **Start with research.**

### **Step 1: Background research.**

Find out as much as you can about the industry, the organization, the surrounding community, the customers and the issues that they are currently facing. Find out as much as you can about the customers and other people that are affected by the organization, especially their opinions, attitudes and behaviors.

### **Step 2: Situation analysis.**

Based on your background research, write one paragraph describing the biggest challenge or opportunity that the organization is facing. Write a second paragraph describing possible obstacles to success.

### **Step 3: Core problem or opportunity.**

Write one sentence describing the main problem or opportunity that you are trying to solve, and include the repercussions of not succeeding.

## **Plan your strategies and tactics.**

#### 4. Goals and Objectives.

What results do you need to achieve in order to solve the problem or take advantage of the opportunity? You don't have to quantify the **goal**, just write it down in one sentence.

Make a bulleted list of all the **objectives**; specific results that you need to accomplish that will make it possible for you to achieve the goal.

Make sure the objectives are very clear, because it will make it possible to choose your key publics. (A "key public" is a group of people that we want to engage with and interact with through our communications in order to reach our goals.)

A good objective is specific, written down, can be measured, attainable, time-bound, cost-effective, efficient and driven by the mission of the organization.

#### 5. Big idea, key publics, messages, strategies and tactics.

The **Big Idea** should sound familiar to you. David Ogilvy said that when you are finding a big idea, ask yourself:

- Did it make me gasp when I first saw it?
- Do I wish I had thought of it myself?
- Is it unique?
- Does it fit the strategy of the product?
- Could it be used for 30 years?

This overarching idea should appeal to all of the key publics that you are going to target. Briefly describe the big idea, the strategy behind it, the message, a visual representation of the idea and a slogan.

Next, choose your **key publics** - groups of people that will help you reach your goal. Decide what objectives you would like to accomplish through each public, what their demographic and psychographic information is, how they are related to the organization, who their opinion leaders are, what motivates them and what ways can you reach out to them.

When you go through the rest of the communications plan (and developing strategies, messages and tactics), always work with one key public at a time before moving on to the next public.

After you choose your key publics, you are finally ready to develop your **messages**. The messages that you will be coming up with revolve around the motivating self-interests of each of

of your key publics. For each public you will need to plan out a couple primary messages (categories of information you want to communicate and the desired action you want them to take) and several secondary messages (information that will add credibility like testimonials, case studies, facts and examples).

Once you have your messages, you're ready to plan your **strategies**. What does each public have to do in order for you to meet your objectives? How will you get your message to each public? Come up with multiple strategies for each public.

Finally it's time to plan **tactics**. (A lot of businesses jump straight to tactics and wonder why they don't get the results that they need). Tactics are the specific creative elements that you will use to get the messages to all of the publics, like YouTube videos, blog posts, Facebook ads, Twitter posts, infographics, etc.

## **6. Calendar and budget.**

Use a Gantt chart to plot out each tactic in relation to time so that you can see how all the moving parts will look together. Organize the calendar by each public.

The budget should also be organized by key public and strategy. Figure out the cost of each tactic and strategy, and also include information on whether any of those costs will be offset by donations or discounts. (If you save your client money, make sure they know about it!) Record the subtotal for each strategy and public. That way, if something appears to be more expensive than anticipated, you can simply remove it from the plan.

## **Double-check the logic of the plan.**

## **7. Communication Confirmation Table.**

A communication confirmation table is a tool to help you manage all the strategies and tactics as you implement them. It also gives you another chance to check the logic of each part of the plan. You can ask how each tactic will meet your goals and objectives.

Make a table that lists: the key publics, objectives for that public, the self-interests of each public, the primary messages, opinion leaders, strategies and tactics.

## **Evaluate Your Results.**

Make a plan for how you will evaluate the success of your campaign. What were the desired results, and what methods will you use to measure those results?

## **Use the 8-Step Strategic Communications Planning Matrix in Your Copywriting Business**

There are a lot of possibilities for how to use this matrix to grow your business. You can have it be one of the services you offer, make it be a required part of your intake process, or teach classes on it to attract potential new clients.