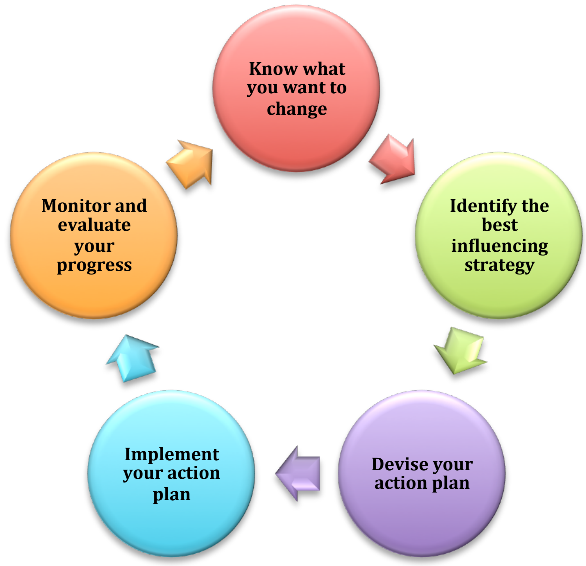
Advocacy & Campaign Planning Mini-Guide #3

Identify best influencing strategy

This Mini-Guide covers Phase 2 of the Advocacy & Campaign Cycle. It describes the steps, processes & tools that enable you to efficiently and effectively identify the best influencing strategy, including your approach, target audiences and messages.

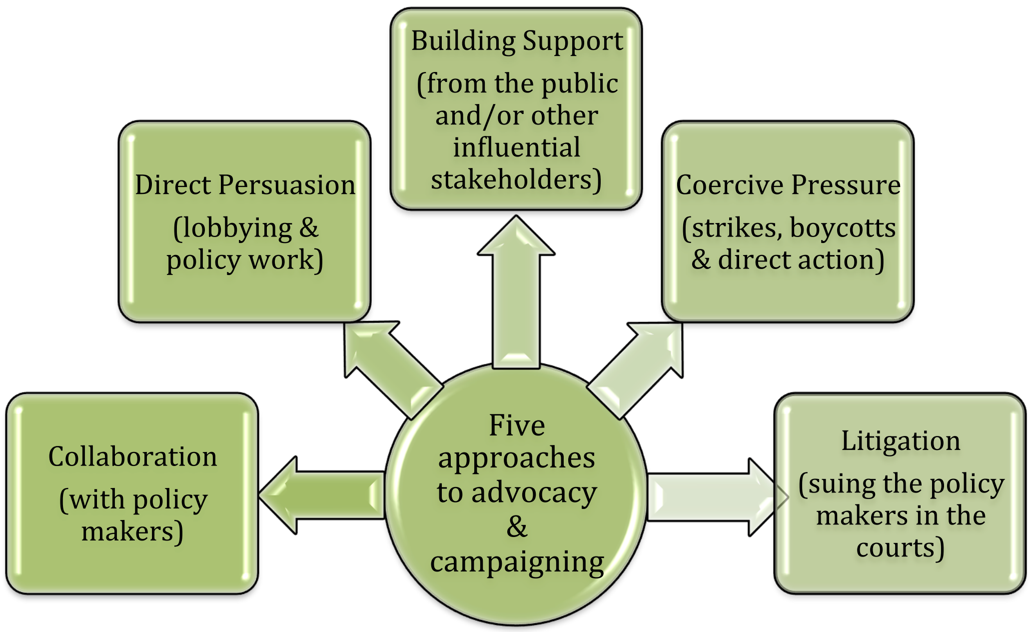


It should be read alongside mini-guide #1: *Advocacy & Campaigning – an Overview*, which explains the Cycle and the Planning Pathway, putting this phase into a wider, strategic context.

The starting point for this guide is that you have already defined and agreed your advocacy aim and objectives (see planning guide *Know what you want to change*). For each objective, you now have to identify the best influencing strategy that will enable you to achieve that objective. If you have more than one objective, you will need to follow this process for each of them.

Theories of change

There are many theories of how change happens at both a macro and micro level, but they are usually specific to a particular set of circumstances. When planning advocacy, we need to understand which circumstances apply to the decisions we want to change and how we can influence the decision-makers perception of them. In broad terms, we have five choices of influencing strategy:



The Planning Pathway: Identify best influencing strategy

Five distinct steps are involved in the process of identifying the best influencing strategy to achieve an advocacy objective:

Understand the change process → Analyse the wider context → Assess your capacity to influence change → Select your approach and target audiences → Devise your core message and guidelines

1. Understand the change process

If you are to find the best route to influencing change, the first and most important thing you must do is to understand the change process that you are trying to influence.

If you are trying to influence a **policy** decision of a business, government or other body, then there are five questions to answer:

a) Where is the decision made?

b) Who makes the decision?

c) How is the decision made?

d) When will/could the decision be made?

e) What influences the decision?

If you are trying to influence the **practice** of an institution, the questions to ask are:

a) Who is responsible for that practice?

b) Why does this practice take place? What factors influence that practice?

c) What are the incentives and barriers to adopting the change that you are promoting?

If you are trying to influence the **behaviour** of an individual or group of people, similar questions need to be answered:

a) Why do they practice the behaviour that you want to change? What needs do they have that this behaviour meets?

b) What are the incentives and barriers to adopting the change that you are promoting?

To help you understand the institutions that you want to influence, there are a number of mapping tools that can be used. Simple **organograms** are a good start to help identify areas of responsibility and lines of accountability and authority, but they don't always help us to understand internal power and influence. Bringing together some experts to create a **systems map** may show internal influence and relationships. **Decision flow charts** are often useful, even if not completely accurate. A **force-field analysis** to identify the factors influencing a decision or behaviour is usually very valuable.

Whatever approach you use to understanding the change process, it is essential to establish who the decision maker is. For almost any policy change objective, there must be an associated "Decision Maker". The Decision Maker is always an individual within an institution, being the person responsible for that decision. The Decision Maker should be distinguished from Decision Approvers, Decision Advisers and other stakeholders in the policy making process. The Decision Maker may not have the authority to decide the policy on their own, but they are always the gate-keepers for that policy. They are responsible for formulating the policy that will go to the decision approvers for formal adoption.

2. Analyse the wider context

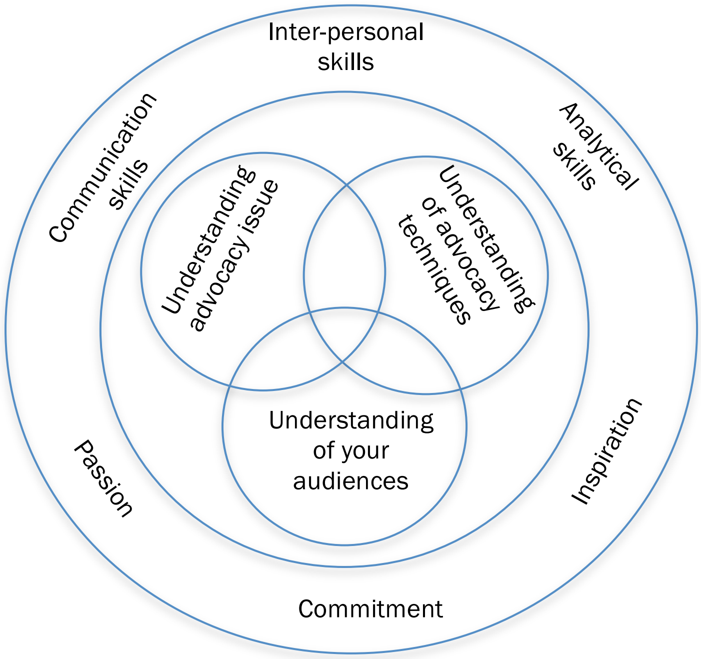
When we have a clear idea of the decision-making process we want to influence, we then need to explore how the wider context impacts on that decision-making process and on our choice of advocacy approach.

The key tool for gathering a holistic analysis is PESTLE, which prompts us to research and assess explore factors and trends in six areas: **P**olitical, **E**conomic, **S**ociological, **T**echnological, **L**egal and **E**nvironmental. Having listed all the factors under each heading, you should identify and rank which of them are most significant to your advocacy on this issue – either as opportunities or threats.

3. Assess your capacity to influence change

In order to make an informed choice of strategy, you need to take into account your capacity as an organisation or network to influence the change you want. Areas to consider include:

- Human resources – How much time is available from your people to enact the strategy?
- Knowledge and Skills – Do your people have all the knowledge and skills that are needed to plan and implement your advocacy strategy?
- Financial resources – What funds are available to employ dedicated staff, hire expert support, undertake research, produce materials, hold events or do other advocacy activity?
- Information resources – What research and evidence do you have to support your analysis and arguments? How credible is that evidence?
- Reputation and relationships – How are you seen by those you want to influence? Do you have access to key stakeholders?
- Power – What power do you have? What power do others have?



Advocacy Capability Model: to what extent are all these qualities present in your team and working well together?

A useful tool for assessing the effectiveness of your planning is the *Advocacy Planning Self-Assessment Questionnaire*, which can be downloaded from www.thepressuregroup.org

You may wish to consolidate the findings of steps 2 and 3 into a SWOT analysis.

4. Select your approach and target audiences

For the objective that you have selected and using your understanding of the change process, your assessment of your capacity to influence that change process, and your analysis of the external environment, you are now in a position to select which of the five strategic approaches you will adopt in order to exert maximum influence on the decision maker and the decision making process.

- If the barriers to change are not very high, there is a commitment to solving the problem by the policy makers and you have a good relationship with them based on mutual trust and respect, then a collaborative approach may be appropriate.
- If the barriers to change are high and your position seems weak in relation to the policy-makers, but there is a law that the policy-makers are breaking and a strong and independent judiciary in place, then litigation may be the best way forward.

This part of the guide does not address either of those two specialist circumstances.

It is likely that your approach will be one or more of Direct Persuasion, Building Support and Coercive Pressure. For these, you need to do a **Stakeholder Analysis** to identify your target audiences and their influencing objectives. There are five options that will form the basis of your influencing objectives:

a) Persuade audience to agree with your position (for influential neutrals and soft opponents)
b) Persuade audience that the issue is important (for influential but disinterested allies)
c) Build alliances for joint advocacy (for interested allies)
d) Increase their influence (for weak but committed allies)
e) Decrease their influence (for influential and committed opponents)

You can download from www.thepressuregroup.org a guide to a version of stakeholder analysis that has been developed by Ian Chandler specifically for use in advocacy and campaign planning.

5. Devise your core message and guidelines

When designing your campaign, you need a mechanism that is used by all communicators to craft their messages. If you are to achieve the difficult task of changing people's attitudes and behaviours, then you must make sure that your messages are framed in the way that we want, that they are focussed and reinforced with constant repetition, as well as being consistent and coherent across different audiences. You can do this by developing a single message proposition and a set of communications guidelines.

A proposition is a short phrase (no more than 8 – 10 words) that specifies the key message that you want your audiences to remember. Defining it in less than ten words limits you to saying just one thing and ensures that you are clear what you are saying (both essential characteristics of effective communications). It is not a slogan or a sound bite (although later on these may be derived from your proposition), and the actual words might not be used in public. You will try to express the proposition in the most appropriates ways for your different audiences – for example by using pictures, videos, stories, statistics, quotes, speeches, reports and books.

Having devised your proposition, you may also want to define some communications guidelines – the dos and don'ts of what to say and how to say it.

Finally, it is helpful to set out clearly the campaign narrative – a short text of no more than half a page, that sets out in a narrative form the problem, solution and reason to act. This narrative should be clear and compelling. It will form the basis of your 'elevator speech' (a short 15 – 30 second speech that your team should rehearse to explain your advocacy campaign to the people they encounter) as well as shape the stories that you want to tell in our communications.

You now have a clear influencing strategy – target audiences, influencing objectives and message proposition – which needs to be formally agreed and adopted before you can move to the next stage of developing action plans.

This is #3 of a series of Advocacy & Campaigning Guides written by Ian Chandler. It should be read alongside Guide #1 *"Advocacy & Campaigning – an overview"*, which puts it in a strategic context.

Each guide aims to clearly and concisely show how progressive non-profit groups can improve the impact of their advocacy and campaigning. Throughout the series, leading edge concepts and tools are introduced and explained, helping readers to focus on what is most important and make the best possible strategic choices. They can be downloaded for free from www.thepressuregroup.org

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