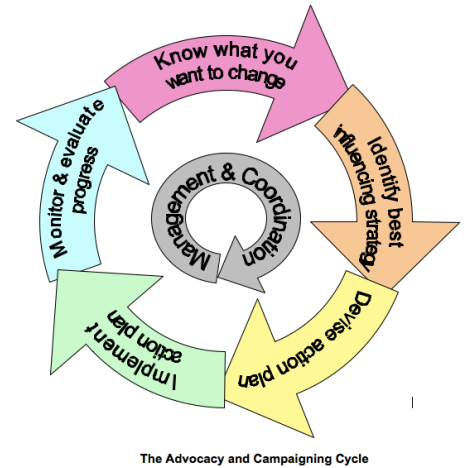


Action Planning Templates

for use in planning engagement with specified target audiences as part of an advocacy strategy or campaign plan

It can be a challenge to develop action plans for engagement with target audiences that are both creative and in line with the overall advocacy/campaign strategy that has been developed. Action plans, whether tired repetitions of previous work or innovative ideas, are all too often not fulfilling the goals of the influencing strategy because they have been poorly designed.

The templates set out in this Mini-Guide can be used as part of the planning process to help maintain a strategic focus during the action-planning phase of the Advocacy & Campaigning Cycle. They are not set in stone and can be adapted as you see fit – they are just there to help guide your thinking.



Communications Summary Plan

The Communications Plan is part of the overall advocacy/campaign strategy, not separate from it, and should not be developed in isolation. The template shown here is an extract from the overall advocacy or campaign strategy, setting out a summary of its communication elements. It lists the advocacy campaign's aims and objectives, its target audiences and the influencing objectives for each of them, its proposition (unifying core message), the desired tone of the communications, and other parameters and logistical details.

Communications Plan		Guidance notes
Aim		Directly copied from the strategy, but included here to remind planners that every message and action should be in line with and contribute to the overall Aim and the specific Objectives.
Change Objectives		
Proposition		The core message that all communications should be promoting, ensuring that the campaign is focused, coherent and promoting the desired framing of the issue.
Message parameters		Rules or guidance on what must or must not be communicated, possibly including tone of voice, branding, use of statistics, and how people are portrayed in words & images.
Approval procedures		Who needs to approve and sign-off plans and individual communications.
Target Audience	Influencing Objective	The audiences who will be directly engaged through the advocacy campaign and the overall influencing objectives for each audience (as specified in the strategy). Might also include how progress towards the influencing objectives will be monitored.

Could also include details of budgets, launch dates, competing messages, etc.

Target Audience Engagement Plan

For each audience that you intend to engage with and influence directly (ie, not through some other channel of influence), then it can be helpful to use the following template to help plan activities to influence them in line with the overall strategy.

Audiences are influenced through a series of **communications activities**. These activities might be direct communications (eg, phone calls, lobbying meetings), events (eg, conferences, talks) or they might be printed or audio-visual materials to be produced and made available to the audience (eg, leaflets, web-pages, videos). Every communication activity that is planned, produced or undertaken should be for a specific audience to achieve a specific purpose.

The starting point in any action planning is the audience, then what you want to achieve with that audience, then the journey that you need to take them down to achieve your influencing objectives. The activities are steps on that journey.

However, advocacy and campaigning is not predictable. As the saying goes “You can drive a horse to water, but you can’t make it drink”, and likewise we can present our audiences with information and carefully crafted messages, but we can never be sure how they will impact on their thinking and behaviour. Therefore, action plans need to be flexible and responsive, being constantly updated within a fixed and stable strategy. So the steps in the early part of the journey can be set out in some detail, but those further down the path will need to be more flexible, informed by the audience’s response to the earlier activities and other changes in the overall campaign environment.

Target Audience Engagement Plan		Guidance notes
Audience		Be specific in how the audience is described or defined*
Influencing objective		What you want to achieve overall with this audience*
Starting point		What do they already know and believe about the issue? What are their current attitudes, values and needs/priorities?
M&E indicators and process		How you will track progress towards the influencing objective and use it to update the rolling engagement plans
Other useful information		Anything else known about the audience, such as where they get their news, what social networks they are part of, etc.
Communication Activity	Purpose	Monitoring indicator/process

*Taken directly from the strategy document.

Rolling Integrated Action Plan & Timeline

Although engagement with each audience might be initially planned in isolation, before they are finalised they need to be brought together into a single action plan and timeline. This will help ensure that the plans are coherent, achieving synergy where possible, and have the required resources allocated to enact them.

The precise format for the action plan should be determined by the nature of the strategy and the organisation or network undertaking it. It can be helpful to set out the action plan in a format that can be easily shared and updated, as well as in a form that can be used for capturing and sharing monitoring information. Setting out the action plan on a spread-sheet rather than a word processing document can make this easier.

Below is a suggestion for how the basic structure of a spread-sheet based action plan could look like.

	Month 1	Month 2	Month 3
Audience	Activities	Activities	Activities
1			
2			
3			

Future months can be added as new columns to the right, and other audiences added as new rows below. Other rows could be added to capture internal coordination and research activities. If the campaign is expected to be fast moving, the columns could specify weeks or days instead of months.

The action plan can be made more useful for task allocation and capturing monitoring data by breaking down each monthly column as below:

Month					
Audience	Activities	By who	By when	When done	Outcome
1					
2					

The outcomes listed in the rolling plan above should be summaries – like doctor’s notes. More detailed records of individual activities and their outcomes may need to be held separately.

Contact Records

Records should be kept for each contact with key individuals, specifying the date and form of contact, who made the contact, what the subject(s) of discussion was and any response made or commitment given. The record should also give a subjective assessment of the targets position and potential for further movement. A more detailed transcript (held on a central server) can be combined with a brief summary – “doctors notes” – shared with the project team and other internal stakeholders.

These records are needed so that contacts with individuals can be managed – either preventing multiple and conflicting contacts, or enabling continuity of engagement even if your personnel change.

Creative Brief

Creative Briefs are the normal mechanism used when commissioning creative agencies and individuals such as designers, writers and video producers. It is hard to be creative in a vacuum, and they need to know what it is that you want and what it is to achieve. However, they can also be used to guide your own thinking if you are writing, developing or organising your own communications materials, activities and events, helping you ensure that the action achieves the purpose it was intended to achieve within the overall strategy. One should be completed for each of the communications activities in your plan.

Creative Brief		Guidance Notes
Audience		From the Target Audience Engagement Plan or Rolling Integrated Action Plan
Influencing Objective		
Name of this activity		
Purpose of this activity		
Message Proposition		From the Strategy/Communications Summary Plan
Communications Parameters		
Description of this activity		A more detailed description of what the activity is and how it will achieve its purpose
Response		More detail of the response you want from the audience before moving to the next activity
Motivations		Why should the audience respond as you want them to? What arguments are you using?
Barriers		Why might the audience not respond as you want? What other priorities do they have?
Context		Is this a stand-alone activity, or is part of a package of other materials and events?
Promotion/Distribution		How will this event be promoted? How will this material be distributed?
Monitoring & Evaluation		How will the effectiveness of this activity be monitored and evaluated?
Other useful information		What else do you know that can guide the design of this activity?
Technical specifications, numbers, budgets etc		
Brief agreed		When approved Who approved it

The above templates are only examples – many different versions exist. Organisations should develop their own templates in line with their approach to advocacy, campaigning and communications.

This is one of a series of Advocacy & Campaigning Mini-Guides by Ian Chandler. This version was published in January 2015. Each guide aims to clearly and concisely show how progressive non-profit groups can make greater impact in their advocacy and campaigning. They can be downloaded for free from www.thepressuregroup.org

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