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A Practical Guide to Integrated Communications

A Workbook for Nonprofits

FOREWORD

When CCAH first began our conversations with Idealware to develop this workbook, our goal was to help nonprofits approach their community engagement as a holistic unit. Our client results have shown time and time again that integrated campaigns outperform single-channel efforts. A multi-channel approach both deepens donor relations and maximizes results.

And this is why it bears repeating, as we often do, that multi-channel communications are the key to growing a strong, devoted supporter base. Reaching advocates and donors where they consume information—whether online, by phone, or via mail—is vital to every nonprofit marketing and fundraising effort. We've found that, no matter the organization, a donor that contributes across channels is the very best donor—consistently delivering high donor value, retention, and average gift.

While these channels can work alone, the most successful programs take full advantage of just how technology has made our own lives interconnected. There simply is no such thing as a single-channel donor or person. Don't discount the tendency of donors to give to any channel, no matter how you contact them initially. John Q. Donor may get a mail piece from you and decide to give online, or he could sign an online petition and become a donor through a prospect package, so it's critical to use a consistent message across as many channels as possible.

The best fundraising programs are fully integrated with all other organizational promotions and outbound communication materials. These can include direct response mail and telemarketing, cause and corporate marketing, public relations, and social media outreach. Even standalone campaigns should feel interconnected and related to the larger organization philosophy so that donors and potential donors are never confused by your messaging.

But developing well-rounded multi-channel programs can often be a challenge. Knowing when to integrate, how to create cohesive messages, and what are the proper channels for each message can be overwhelming—which is why we partnered with Idealware to create this workbook. From defining an ideal communications mix to streamlining the flow of your communications to your fundraising efforts, this Practical Guide to Integrated Communications is a valuable tool for establishing best practices for an integrated marketing strategy for your organization.

So read through the following pages and take a moment to assess your current communications efforts. Test the waters a bit with a new effort that integrates multiple channels. We're confident that your donors will respond by becoming more engaged, and by being more willing to give.

Happy Fundraising,

Kim Cubine
President
Chapman Cubine Adams + Hussey

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Break Through the Clutter

With marketing that stands out— and gets results.

Your nonprofit makes an impact. Your direct marketing should, too. For 25 years, Chapman Cubine Adams + Hussey has been helping organizations locally and globally to test new ideas, embrace innovation and *break through the clutter* with effective fundraising solutions.
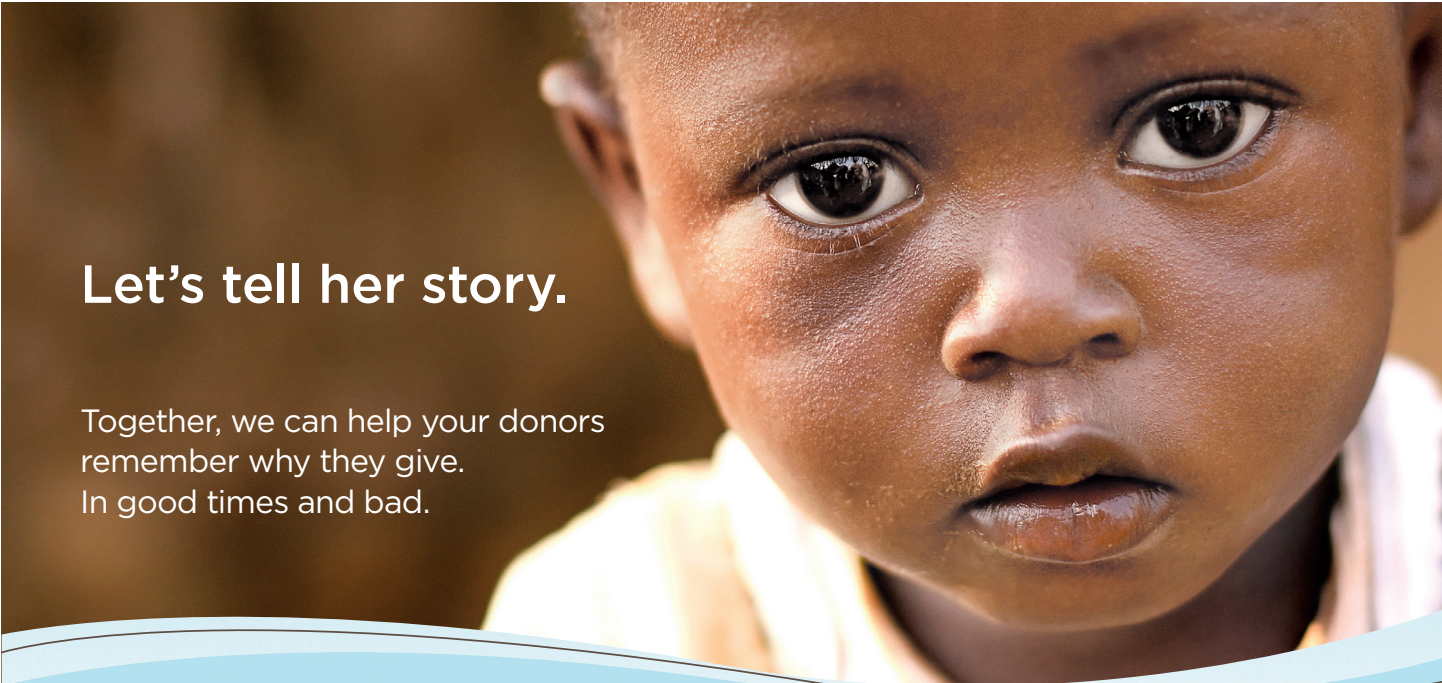
From direct mail to telemarketing to interactive strategies, CCAH's award-winning campaigns help our clients stay one step ahead in a competitive market—and we can help your organization do the same today.

Are you ready to find out what's next?

CC | AH

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ADAMS + HUSSEY

Coast to Coast
ccah.com | 703.248.0025 | @CCAHdirect

INTRODUCTION

Integrating your communications can be difficult. You've likely given some thought to what you want to say, and new resources are always talking about defining your story, messaging, and your call to action. This is important stuff, but it doesn't help you with the tactical questions that you likely struggle with every day. How do you coordinate your communications—which might include email, direct mail, websites, social media, and other channels—so they all feel like they're coming from the same organization without duplicating messages or bombarding people with requests for money and time? How do you try to integrate communications about your campaigns and the things you need with ongoing community building, putting out useful content, and curating the work of others? And how do you schedule it all so you can know what to do—and when—without it taking over your life?

Those are a lot of questions, and that's exactly why we created this workbook. This interactive guide is designed to serve as your blueprint as you work to bring together the many different channels you use to communicate with constituents, and the many different ways you communicate with them. As you complete the worksheets, they'll walk you through an audit of what you're currently doing, teach you to think through what you should be doing, and help you create a tactical plan and schedule to organize your approach to what you're communicating, when, and through which channels.

When you've finished, you'll understand how to create a cohesive integrated communications plan to keep people in the loop about your organization and the amazing things it accomplishes, to ask for money or other support, and to consistently engage supporters and keep them fired up about your cause.

There are a couple of different ways to use this workbook. One is to plow through it from start to finish entirely by yourself as a way to think through your own plan and the possibilities for your organization. Or you could consider it a thinking tool to help you work together with all the people involved in communications at your organization to come up with a plan. In addition, there are a number of worksheets that might be useful as standalone exercises—don't feel you need to complete the entire guide if you can get value from individual worksheets.

However you use it, this guide is designed to help you better understand your communications efforts and to see them as a cohesive whole. Approach it the way that works best for you.

Ready? Let's go…

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SECTION 1: GETTING STARTED

Every journey begins with first steps. For this one, your first move should be to step back and assess what you're doing in the world of communications and start to think about how some of the core frameworks defined in this guide apply to you.

The worksheets in this section will cover the following topics:

1. **Channels and Roles**. What kinds of communications are you currently using? Who's in charge of them? Who should be involved in going through the process of this workbook?

2. **Defining the Four Core Communications Categories**. Throughout this workbook we'll be talking about four core categories of communications: promoting, community building, creating, and curating. In this worksheet, you'll take a look at what each of these is and how it might apply to you.

3. **Communications Self-Assessment**. It's time to get serious about what you're currently doing. This worksheet walks you through a detailed audit of what communications you're sending and how they break down across the categories.

4. **Your Ideal Communications Mix**. It's common to look at what you're actually doing and realize that it's not ideal—this worksheet gives you a chance to adjust your mix to something you think will work better for you.

1. CHANNELS AND ROLES

Before you dive into integrating your organization's communications, let's think through the types of communications you're sending and who's in charge of them to better identify who should be involved with you completing this workbook.

What's your role in your organization's communications?

_____

What communications channels are you currently using in any way to communicate with a substantial number of constituents? Circle all that apply below, and then add any additional ones.

Annual Report	Personal Meetings	Television Advertising
Blogs	Phone Calls	Twitter
Brochures/Flyers	Pinterest	Videos
Direct Mail	Presentations/Trainings	Website
Email	Print Advertising	(other) _____
Facebook	SMS Text Message	(other) _____

What departments or organizational functions send communications? Circle all that apply below, and then add any additional ones.

Administration	Fundraising	(other) _____
Advocacy	Marketing	(other) _____
Alumni	Programs	(other) _____

Who is involved in CREATING or SENDING/POSTING communications for your organization that you might want to consult or involve in this workbook? What are their specific roles in the communications process—for instance, writing direct mail copy? (Add more lines if necessary.)

Person   **Role**

_____   _____

_____   _____

_____   _____

_____   _____

Who else is involved in STRATEGIZING or REVIEWING communications for your organization that you might want to consult or involve in this workbook? What are their specific roles?

Person   **Role**

_____   _____

_____   _____

_____   _____

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Who (if anyone) is responsible for trying to ensure your communications make sense together? What are their specific roles?

Person

_____

_____

_____

_____

Role

_____

_____

_____

_____

WHO OWNS THE INTEGRATION?

In order for an integrated communications approach to work, you will need someone (or multiple people) take this responsibility. If no one comes easily to mind for this section, consider convening the people listed above to assign the job before continuing this workbook.

Is there anyone else you want or need input from as you think through your communications plan?

Person

_____
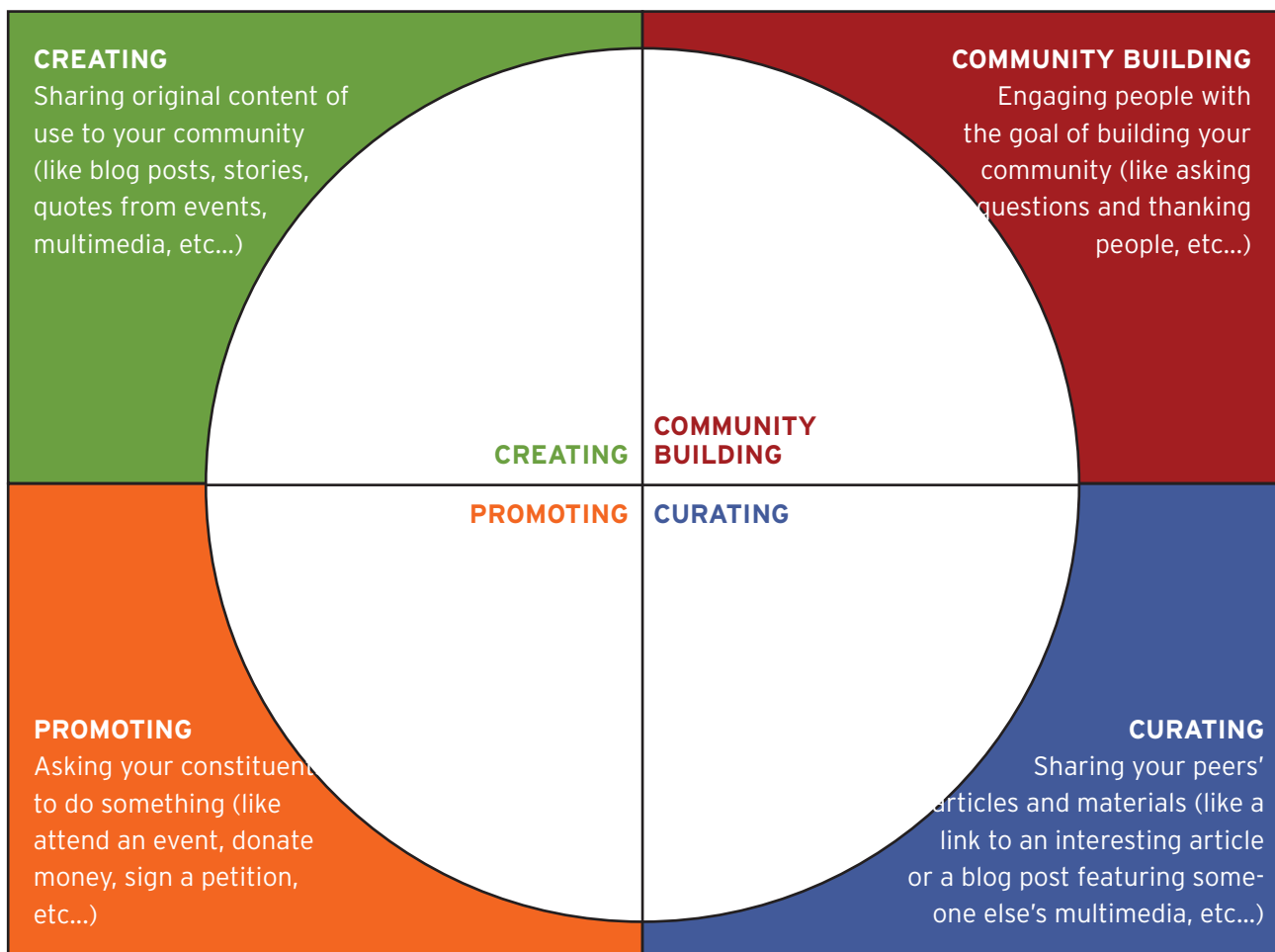
_____

_____

_____

Role

_____

_____

_____

_____

What does all this mean? Go back through your list and circle the people you think should potentially be involved in completing this workbook with you. Put a star by any additional people you think should be consulted along the way.

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2. UNDERSTANDING THE FOUR CORE COMMUNICATIONS CATEGORIES

Each communication channel can do a lot of different things. Their multifaceted nature is what makes them great, but it's also what makes them difficult to manage. Based on research, Idealware has defined four basic communication categories for the functions channels can serve: creating, promoting, community building, and curating. While there are other ways to group them, we've found these distinctions to be particularly useful—no matter what channels you are using or how you are using them, your individual communications can probably be segmented into one or two of these categories.

Each category is described in the diagram below. To help familiarize yourself with them, think back to your organization's recent communications and, in the circle, write some of your past communications that could be classified into each category.

CREATING
Sharing original content of use to your community (like blog posts, stories, quotes from events, multimedia, etc...)

COMMUNITY BUILDING
Engaging people with the goal of building your community (like asking questions and thanking people, etc...)

CREATING

COMMUNITY BUILDING

PROMOTING

CURATING

PROMOTING
Asking your constituents to do something (like attend an event, donate money, sign a petition, etc...)

CURATING
Sharing your peers' articles and materials (like a link to an interesting article or a blog post featuring someone else's multimedia, etc...)

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3. COMMUNICATIONS SELF-ASSESSMENT

Let's take a look at the current state of your communications. What channels are you using? How are you using them? This detailed worksheet will allow you to create a visual picture of what you're actually doing.

To start, think about how frequently you post to your communications channels. For some, you likely communicate at least once a week or more; for others you might post once a month, or with variable frequency. Separate the channels you defined in Worksheet 1 into two groups: those that you use more than once a week, and those you use less frequently.

Once a week or more: **Less than once a week:**

_____ _____ _____

_____ _____ _____

_____ _____ _____

Find those you use fairly frequently and list them across the top of the table below.

Now comes the fun part: For each of those channels, list the last 12 times you used it for communications, starting with the most recent and working backward. Note that throughout this workbook, we call them "messages," but that can mean emails, phone calls, tweets, blog posts, or other forms of communication.

For each message, define and label it—was it promoting, curating, creating, or building community? Note that a message can serve multiple purposes. Repeat for each of the channels you frequently use until the table is complete.

Channels Which You Use Frequently							
	Example: Facebook	CHANNEL ____	CHANNEL ____	CHANNEL ____	CHANNEL ____	CHANNEL ____	CHANNEL ____
Message 1	Community						
Message 2	Promoting						
Message 3	Community						
Message 4	Community						
Message 5	Promoting / Creating						
Message 6	Community						
Message 7	Curating						
Message 8	Community						
Message 9	Promoting / Curating						
Message 10	Curating						
Message 11	Community						
Message 12	Curating						

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You're also likely using channels that you don't make use of weekly—for instance, direct mail or email. Pull those channels from the list above (make sure each of your channels is on one of the tables) and list them across the top on the second table, below.

Then, for each, list the last four messages you used it for, starting with the most recent and working backward (remember, "message" can also mean emails, phone calls, tweets, blog posts, or other forms of communication).

For each, define and label it—was it promoting, curating, creating, or building community? Note that a message can serve multiple purposes. Repeat for each of the channels you use frequently until the table is complete. For these less-frequent communications, it's common for one communication to serve a number of purposes.

Channels You Post To Less Frequently							
	Example Channel	CHANNEL _____	CHANNEL _____	CHANNEL _____	CHANNEL _____	CHANNEL _____	CHANNEL _____
Message 1	Promoting						
Message 2	Promoting						
Message 3	Curating/ Creating						
Message 4	Creating						

Now, to make sense of all of the information you have captured above, starting on the next page we're going to create a pie chart for each communication channel. These charts will offer a visual representation of how you are using each channel that lets you see how they all relate to one another.

Identify up to eight of your most essential channels. For the more frequent channels, you've categorized 12 posts, and there are 12 even slices in the circle—so count them up (including fractions, if you've counted one post as multiple types) and use them to create slices as in the example shown on the next page. For your less-frequent channels, use the quarter lines to help divide your sections. Then break out some markers, colored pencils, or crayons and color code it. (If you've printed this worksheet in color, you can use the colors we used in the example; otherwise, define your own color code.)

Need more help breaking down your audit into a pie chart? Keep reading…

Using the chart below, count and tally each time you have used a communication channel for a given category. For your frequently used channels you should have 12 total tallies; for your less-frequent channels, you should have four.

Let's walk through the example: We see *Community Building* show up six individual times in the messages list, so we've entered a tally of "six" into the tally chart. We see *Promoting* show up once as a full message, so we entered a single tally, and twice as a shared message, so we entered two half-tallies—totaled, that equals two full tallies for *Promoting*. For *Curating* we count three full messages represented by three full tallies, and a shared message represented by the half tally. Finally, for *Creation*, we only see it represented in one shared message, so we show it as one half tally in the chart. When totaled, we have 12 full tallies.

Finally, we transfer our tallies into a pie chart, with one tally equaling one pie section on the chart. So, for community building we fill out six pie slices for our six tallies.

	FACEBOOK
Message 1	Community
Message 2	Promoting
Message 3	Community
Message 4	Community
Message 5	Promoting / Creating
Message 6	Community
Message 7	Curating
Message 8	Community
Message 9	Promoting / Curating
Message 10	Curating
Message 11	Community
Message 12	Curating

FACEBOOK

Community Building	Curating	Promoting	Creating
ⵏⵏⵏⵏ I	❘❘❘ ½	❘ ½ ½	½

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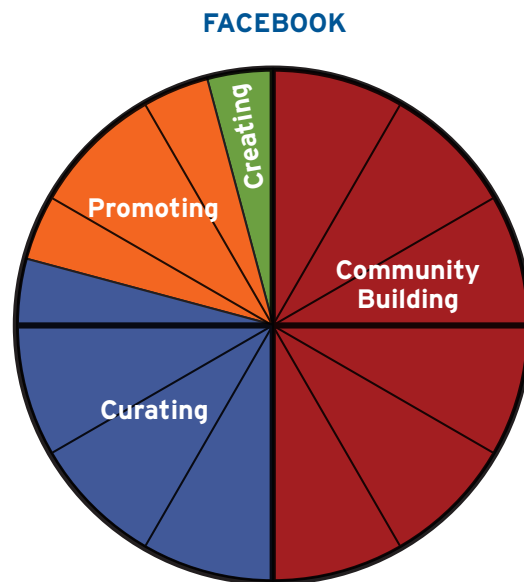
Create a pie chart for each of your channels drawing from the tables at the beginning of this worksheet. You can optionally use the shaded/colored boxes to tally up each type of post, if you like.
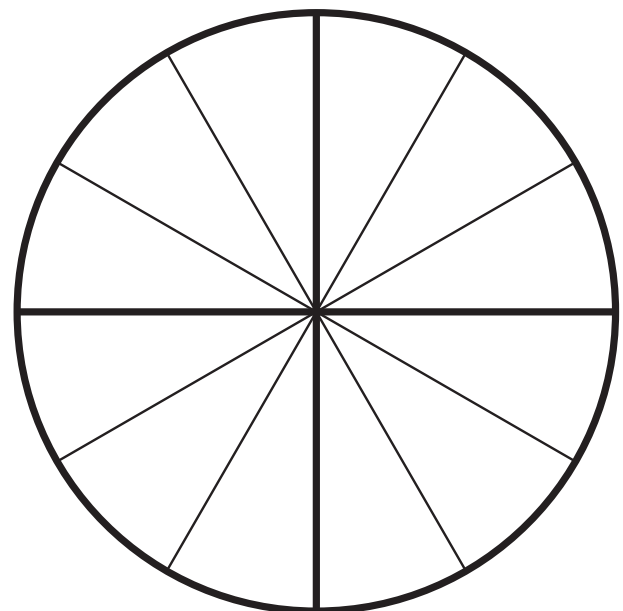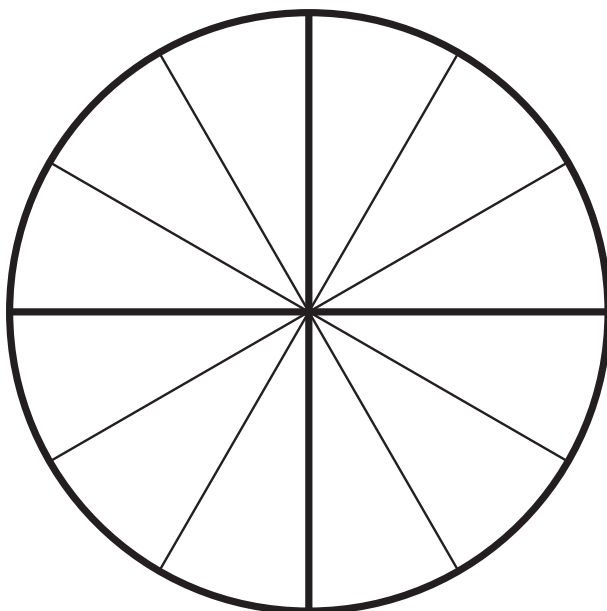
CHANNEL:			
Community Building	Curating	Promoting	Creating

CHANNEL:			
Community Building	Curating	Promoting	Creating

CHANNEL:			
Community Building	Curating	Promoting	Creating

CHANNEL:			
Community Building	Curating	Promoting	Creating

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CHANNEL:			
Community Building	**Curating**	**Promoting**	**Creating**

CHANNEL:			
Community Building	**Curating**	**Promoting**	**Creating**

CHANNEL:			
Community Building	**Curating**	**Promoting**	**Creating**

CHANNEL:			
Community Building	**Curating**	**Promoting**	**Creating**

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4. YOUR IDEAL COMMUNICATIONS MIX

Take a step back for a moment and think about what you actually want to accomplish with your communications as a whole. Think through the value of each category for your organization, and check the appropriate box to rank each as *low priority*, *medium priority*, or *high priority* for your overall communications.

	Low Priority	Medium Priority	High Priority
Promoting			
Community Building			
Curating			
Creating			

Now look at the pie charts you created in the last worksheet. Do you see a dominant category or categories? Which ones?

_____

_____

Does it make sense for that category or categories to be dominant based on how you ranked them? Why or why not?

_____

_____

_____

_____

How do the pie charts match what your gut tells you that you should have? What would you do differently in an ideal world?

_____

_____

_____

OK, now create an adjusted set of pie charts that represent your ideal, as this is what you would logically work toward when creating your communications plan. On the next page, color in the pie charts based on your organization's ideal mix of communications types. This doesn't need to be as number-based as the last set—instead, start with your self-assessment and adjust the pie charts toward what you hope to be producing.

When you're done, hang on to this set of pie charts. We'll be referring to them again as you think about your communications mix throughout the rest of the workbook.

WORKING TOWARD AN IDEAL

You may never get there, but thinking about what you would do in an ideal world can be a helpful exercise for crafting or reviewing a communications strategy. For instance, it can:
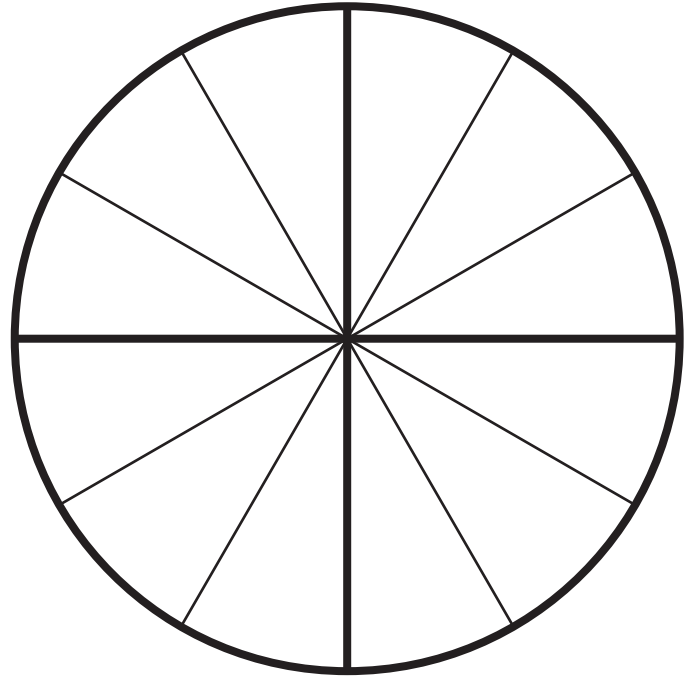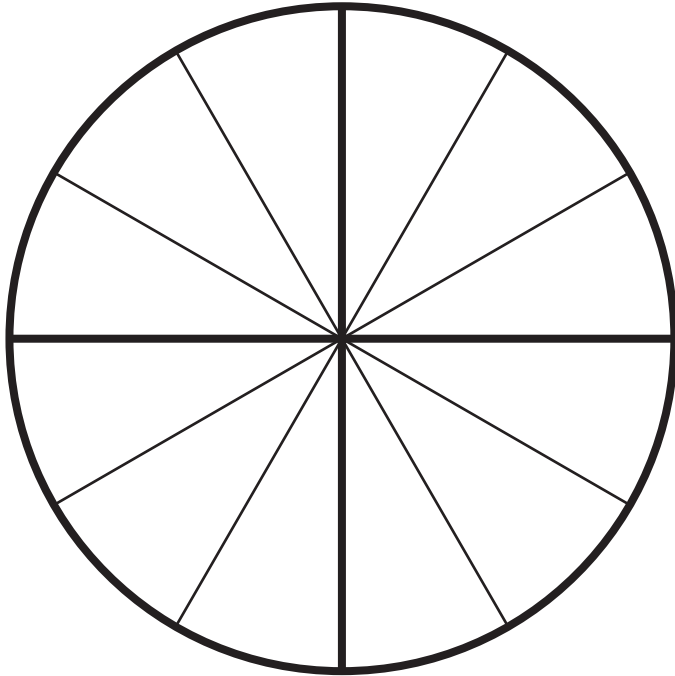
- Help you set goals
- Help you recognize areas for improvement
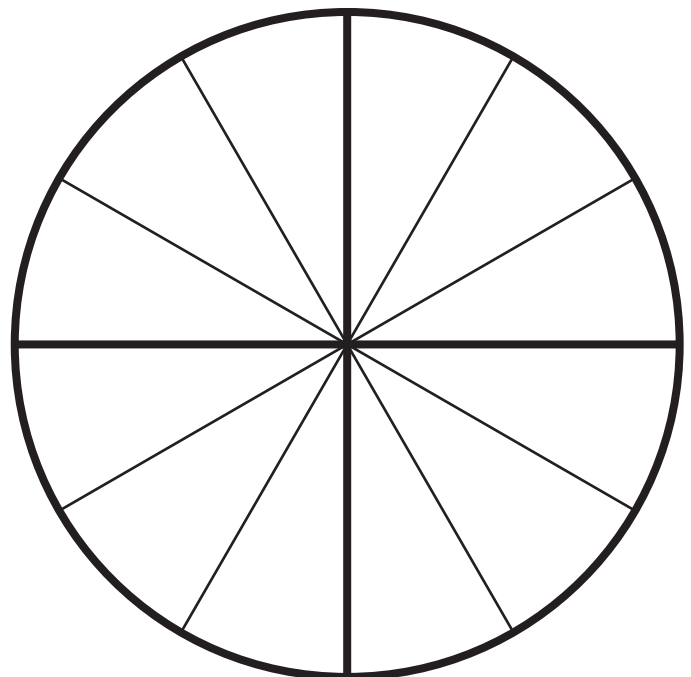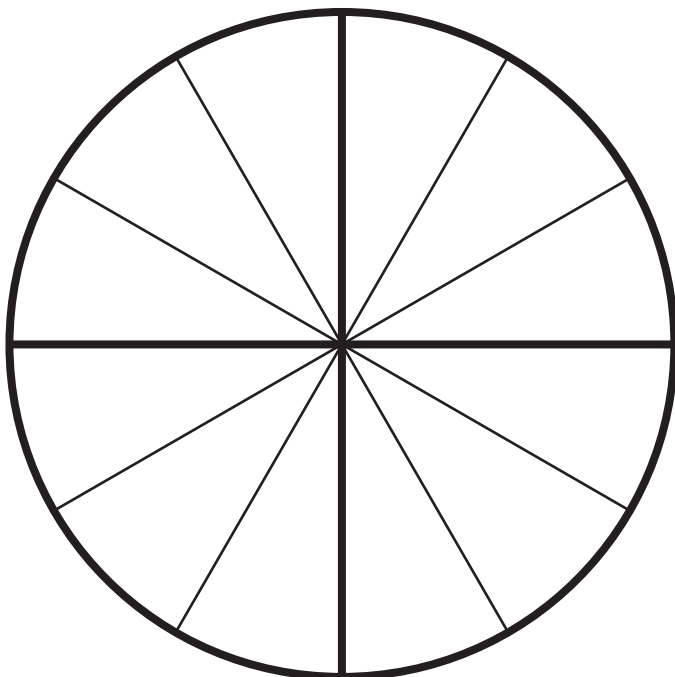- Help you keep a strategy in mind without needing a full and formal plan
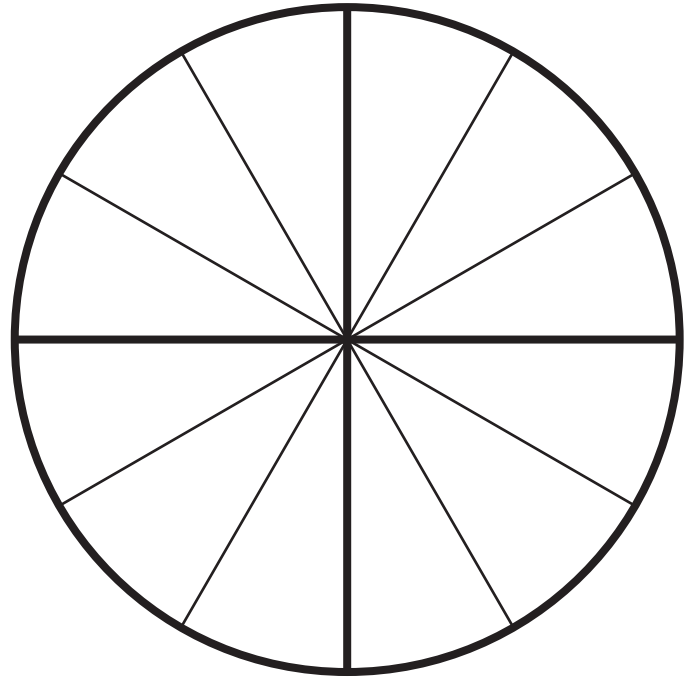
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Ideal Mix

CHANNEL:
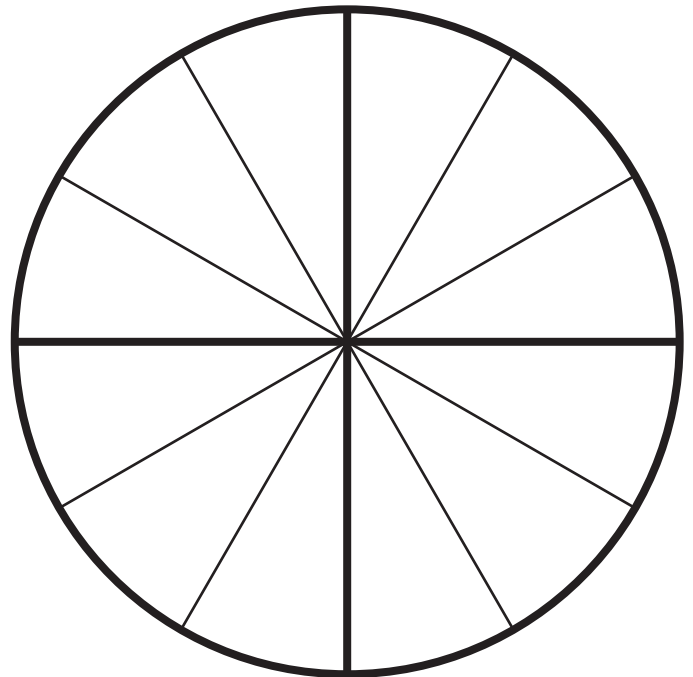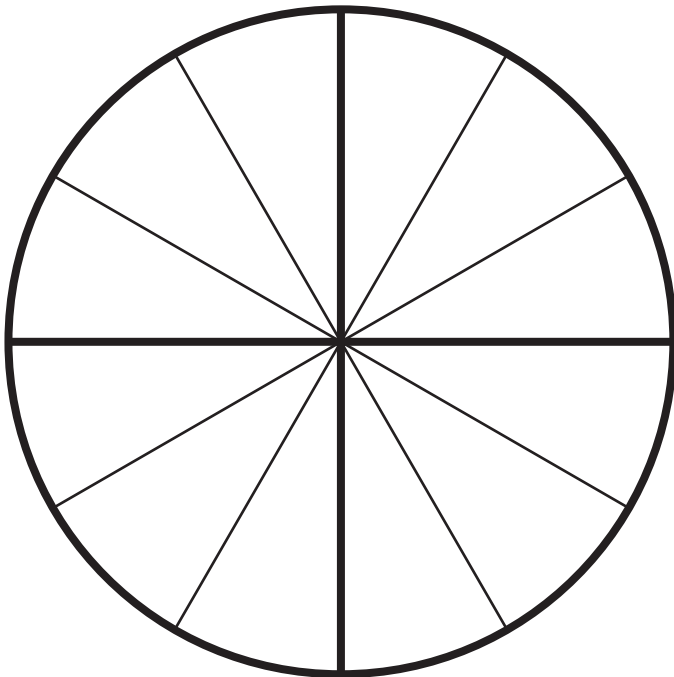
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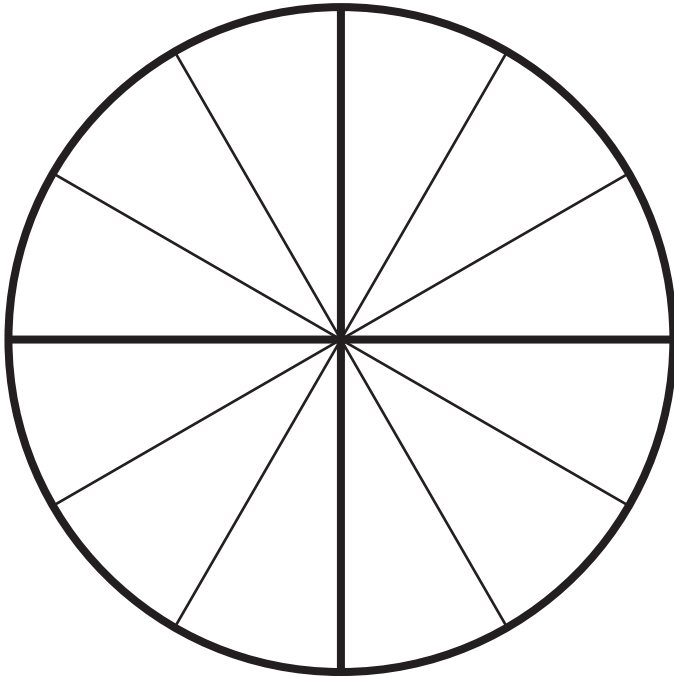
SECTION 2: DEFINING A CAMPAIGN COMMUNICATIONS MIX

While it is always helpful to look at your communications as a big-picture whole, we have found it can be difficult to plan when you work in the aggregate. In order to think strategically through your communications mix, it can be helpful to consider times of high volume and times of baseline interaction–think about them as ocean waves. For this purpose of this workbook, we'll first explore how we deal with integration as it applies to campaigns. Then we'll look at maintenance periods separately.

This section includes the following worksheets:
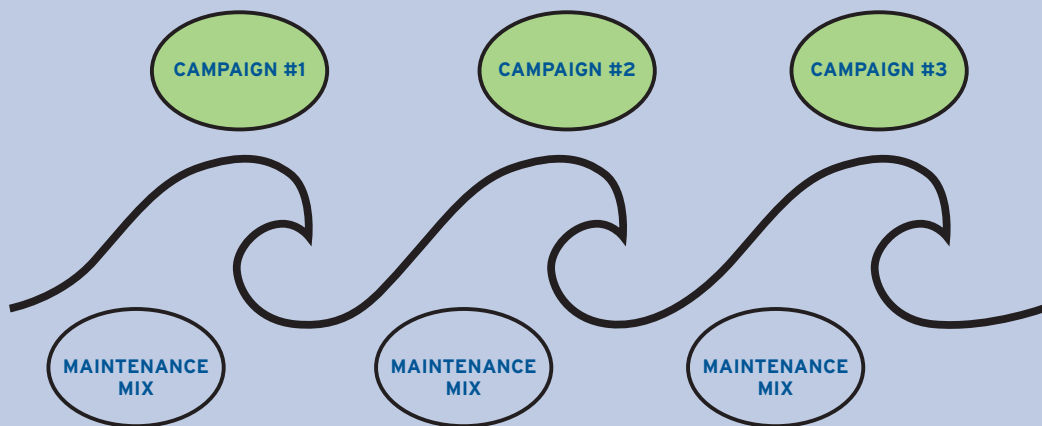
5. **Planning Your Campaign**. Whether promoting an event, engaging constituents to take a particular action, or recruiting volunteers, campaigns with clearly defined start-and-end-dates are a key part of communications. This worksheet will help you plan them.

6. **Channels for Your Campaign**. Will you use all the different channels available to you for the campaign, or just certain ones? What categories of communications will you them for? This worksheet helps you to figure it out.

7. **Flow of the Campaign**. "Flow" refers to how you will direct or encourage people to take the next step in a campaign—for example, getting email recipients to sign a petition or watch a video. Use this worksheet to plot out your campaign's flow.

8. **Your Overall Campaign Schedule**. Every campaign is made up of a series of milestones, from launch to close and all the messaging and events in between. This worksheet helps you think them through and schedule them.

9. **Your Week-by-Week Campaign Calendar**. Once you've plotted at a high-level, use this worksheet to plan each channel's use during each week of the campaign.

10. **A Detailed Campaign Week**. This worksheet helps you create a detailed look at the initial week of your campaign.

11. **Measuring Your Campaign**. Tracking the effectiveness of your communications is critical to your ability to adapt what does and does not work. Use this worksheet to get started.

5. PLANNING YOUR CAMPAIGN

Let's focus on the kinds of campaigns you run or hope to run. As we discussed, a campaign is a period of outreach with a particular goal in mind. See the sidebar for a few examples.

What are some short campaigns you want to run in the future? Brainstorm a number of possible upcoming campaigns.

_____

_____

_____

Now pick a single upcoming campaign from the list above to work on throughout this worksheet and write it below. For the purposes of this exercise, pick something two months or shorter in length.

_____

Let's think this campaign through in more detail.

When will it start? _____ When will it end? _____

What do you hope to accomplish with it?

_____

_____

Who is your target audience?

_____

_____

What four communications channels will you use most for the campaign?

1. _____ **3.** _____

2. _____ **4.** _____

What will success look like for this campaign? For example, are you looking to raise a certain amount of money? Get a specified number of signatures on a petition? Get a targeted number of people to show up?

_____

_____

_____

SOME EXAMPLES OF CAMPAIGNS

- Promote an event
- Build excitement prior to an event
- Get people to take a particular action
- Draw traffic to a particular online resource
- Build your email list
- Solicit donations for you organization
- Get supporters to solicit donations for you
- Recruit volunteers
- Brand your staff as experts on a cause or issue
- Get your constituents to talk to each other

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6. CHANNELS FOR YOUR CAMPAIGN

Let's consider what you'll do with each of your channels for this particular campaign. Remember that even during a campaign, getting creative with your messages and doing more than just promotion can be very valuable.

On the next page, begin by labeling each of the pie charts with the four channels you said you'll be using most.

Next, look back at your ideal pie chart in Worksheet 4 for each of these channels. For each, how much of your overall communications mix will this campaign use? Redraw your ideal pie charts based on your campaign. Think about each category and record the types of activities you will do during the campaign as we do in the example. Leave out the slices that won't be used specifically for this campaign.

Channel: Facebook
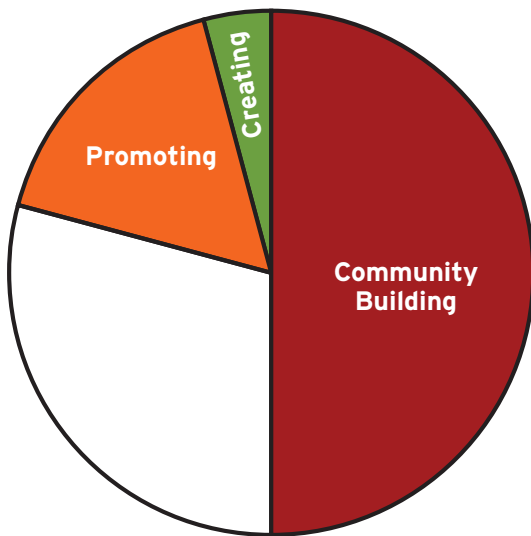
COMMUNITY BUILDING ACTIVITIES:
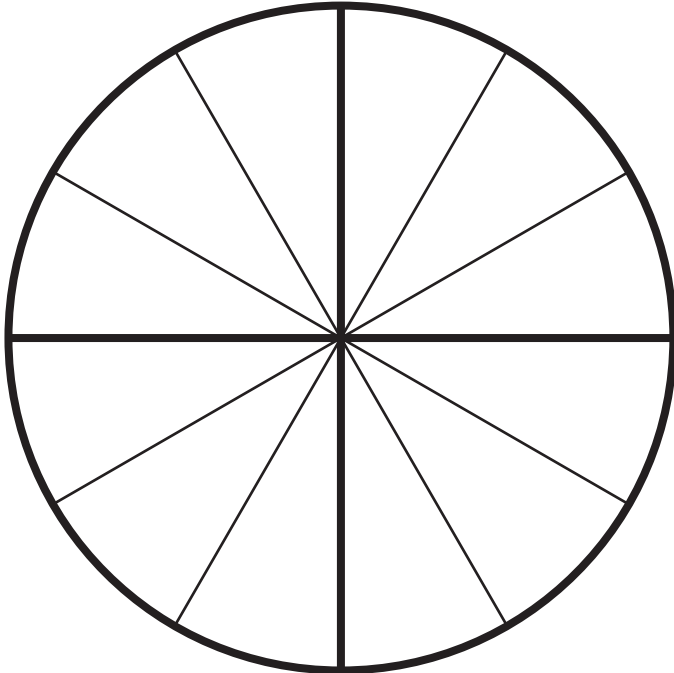Share stories of those to be honored at the event...

CURATING ACTIVITIES:
None for the campaign...

PROMOTING ACTIVITIES:
Share news about the upcoming event and make a sales pitch...

CREATING ACTIVITIES:
Share blog posts about event development, what will happen at the event, explain reasons for the event...
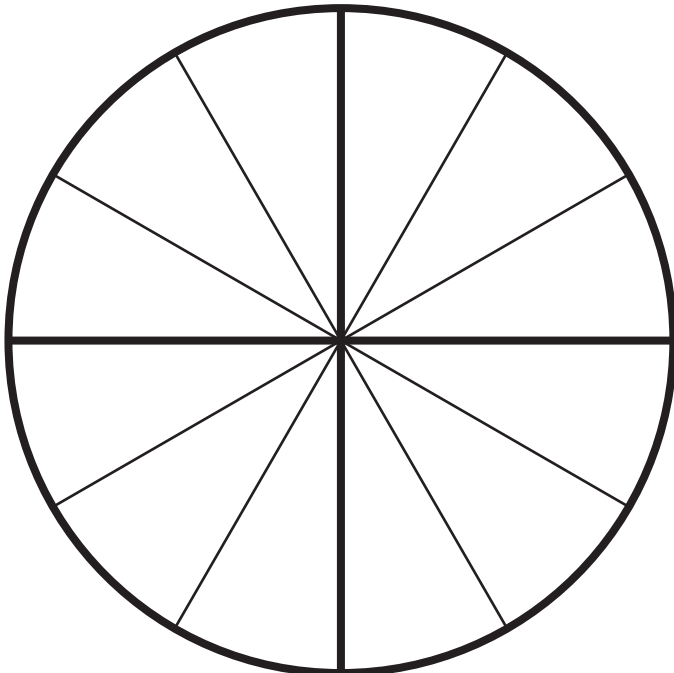
Channel:

COMMUNITY BUILDING ACTIVITIES:
CURATING ACTIVITIES:
PROMOTING ACTIVITIES:
CREATING ACTIVITIES:

Channel:

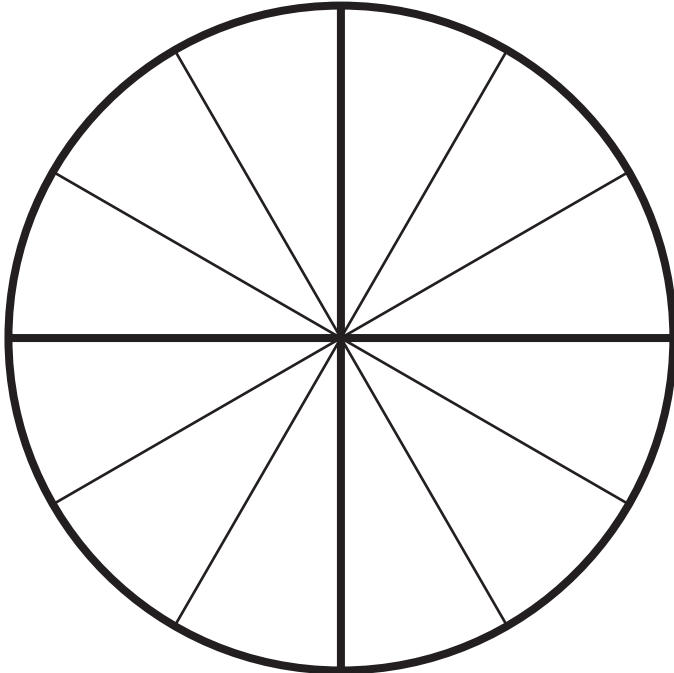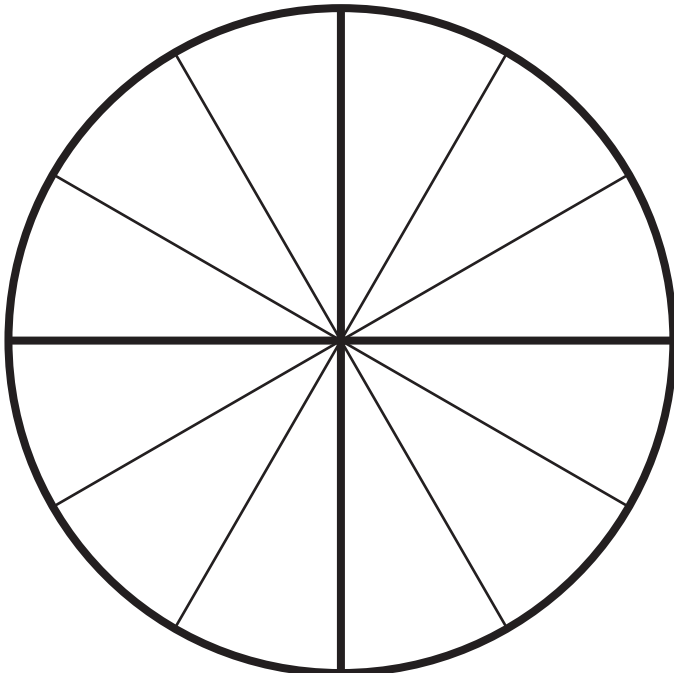| COMMUNITY BUILDING ACTIVITIES: |
|---|
| CURATING ACTIVITIES: |
| PROMOTING ACTIVITIES: |
| CREATING ACTIVITIES: |

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Channel:

| COMMUNITY BUILDING ACTIVITIES: |
| CURATING ACTIVITIES: |
| PROMOTING ACTIVITIES: |
| CREATING ACTIVITIES: |

Channel:

| COMMUNITY BUILDING ACTIVITIES: |
| CURATING ACTIVITIES: |
| PROMOTING ACTIVITIES: |
| CREATING ACTIVITIES: |

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7. THE FLOW OF YOUR CAMPAIGN

Let's say you want to move people from one of your communications channels to another—for instance, you might be trying to get people who receive your email to watch your online video and then to sign their name to an online petition. We'll call this "flow."

For your campaign, determine the following:

- Where do you want your followers to go? For example, a donation form, a petition site, or an event registration page? Write it in the "primary destination" box below.
- What are the main channels you will be using to drive followers directly to that destination? Write them in the "primary channels" boxes below.
- What are the channels that will be used for less-frequent messaging, or to indirectly address the primary destination? Write them in the "bit players" boxes below.
- How will the campaign flow? If it seems useful, draw arrows to show the ideal flow of your followers from one channel to the next.

Understanding the flow of your campaign will be useful as you dive into scheduling. Keep these relationships in mind as you plan out what communications will happen, and when.

BIT PLAYERS

PRIMARY CHANNELS

PRIMARY DESTINATION

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8. YOUR OVERALL CAMPAIGN SCHEDULE

By now you have a general sense of what content you're going to include in your campaign and how you'd like all your channels to work together. Let's turn to timing and identify a list of possible milestones in your campaign schedule.

Start by thinking through your essential milestones within your campaign. We've filled in Campaign Launch, Last-Chance Reminder, and Campaign Close to get you started, but there are probably others. For instance:

- Are there events tied in with the campaign that will need to be promoted?
- Are there any milestones related to the length of the campaign (the halfway point, etc.) or dates (New Year's Day, your Executive Director's birthday, first day of school) important for scheduling?
- Will you send any one-time communications like direct mail or standalone email during the campaign that need to be carefully scheduled?

Fill these milestones into the table below, in approximate order, and enter a date for each (feel free to estimate if you're unsure of the exact date). In the middle column, note which of the channels will be affected by the milestone; for example, a launch will affect everything, but a direct mail drop might affect your email but not Facebook. Don't feel like you need to fill in all the rows; just leave them blank if you don't need them.

Possible Milestone	What Channels are Affected?	Date
Campaign Launch	All	
Last Chance Reminder	All	
Campaign Close	All	

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9. YOUR WEEK-BY-WEEK CAMPAIGN CALENDAR

You've defined your campaign milestones at a high level, but what does that mean for what you're actually going to do with your different communications channels?

First, write the start date of each week in the appropriate box to orient yourself. Now, do the following:

- Write in your four primary channels across the top of the table below.
- Identify approximately how many times you plan to use each channel for messages about the campaign each week, and list that number in the channel box as well. (Remember, when we say "message" it might refer to emails, phone calls, posts, direct mails, tweets, or other communications.)
- Enter your key general milestones from Worksheet 8 into the "Milestones" column into the appropriate week on the table. Review your channel-specific milestones form Worksheet 8 and enter them into the appropriate channel column in the appropriate week.
- Now that your milestones are in place, they can act as an anchor for the remainder of your communications— take a pass through each week and identify the milestone-related communications planned for each channel.

Need more help? Look at our "Example Week" below to get a sense of the specificity needed for this process. You may find it useful to think about essential messages for each channel and how often you'll use each at non-milestone points. This week-by-week calendar can act as a high-level plan for your overall campaign and will be valuable to draw on for a weekly plan.

Sample Calendar: Boosting Attendance at an Event

	Milestones	Channel 1:	Channel 2:	Channel 3:	Channel 4:
Frequency Throughout Campaign:		Facebook: Post twice a week.	Email: One email every other week.	Twitter: Two posts a day about campaign.	Blog: Up to two posts a week.
Week 1:	Launch Week	Two posts about campaign launch, no other posts.	Standalone email about event.	Four posts about launch, six other posts.	No post this week.

Calendar Worksheet

	Milestones	Channel 1:	Channel 2:	Channel 3:	Channel 4:
Frequency Throughout Campaign:					
Week 1:					
Week 2:					
Week 3:					
Week 4:					
Week 5:					
Week 6:					
Week 7:					
Week 8:					

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10. A DETAILED CAMPAIGN WEEK

You've got the overview picture—now, dive into the details for the first week of your campaign specifically. How will you use each of these channels on a day-by-day basis?

In the table below, create a box for each message that you planned in the last worksheet. Add in the name of the channel.

Then, get out your markers again. For each message, color code the category. In our example, Promoting is orange, Creating green, Curating blue, and Community Building red.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		Regular eNews Campaign Emphasis		Blog-Article Emphasis		
		TW-eNews Reminder	TW-Article Reminder	TW-Mention blog		
	TW-Resources	TW-Resources		TW-Resources	TW-Resources	
	FB-Question	FB-Poll	FB-Photo	FB-Video	FB-Question	
	FB-Resource	FB-Reminder eNews	FB-Article Highlight	FB-Discount	FB-Blog Reminder	

Now you're ready to go through each message and identify a general description of the category as per our example on the right. As you build the calendar, keep an eye on the balance of your campaign. Is there a good mix of different channels and a variety of categories in your daily and weekly messages?
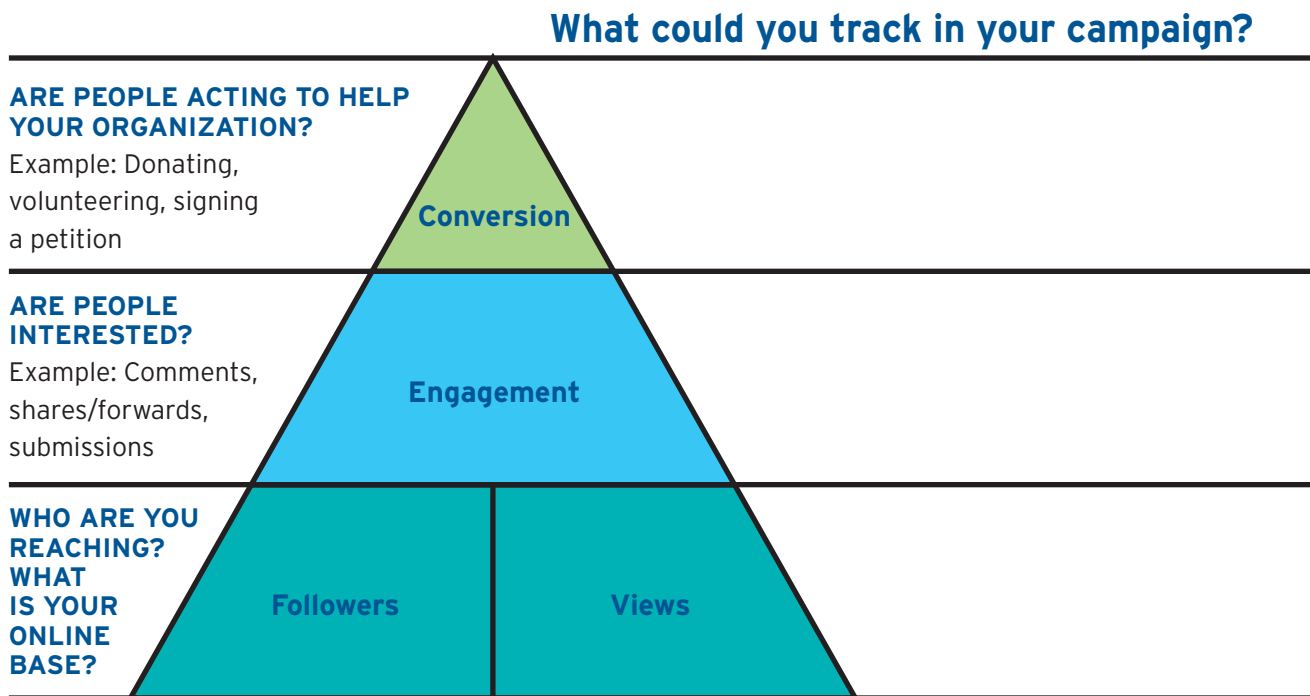
Sun	Mon	Tue	Wed	Thu	Fri	Sat

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11. MEASURING YOUR CAMPAIGN

It's critical to measure your campaign's effectiveness to help you plan for the future and make changes based on what does and does not work.

Idealware defines four core types of communications metrics: Followers, Views, Engagement, and Conversion. In the diagram below, jot some notes about what each type of metric might mean for your campaign. What could you track?

What could you track in your campaign?

ARE PEOPLE ACTING TO HELP YOUR ORGANIZATION?
Example: Donating, volunteering, signing a petition

Conversion

ARE PEOPLE INTERESTED?
Example: Comments, shares/forwards, submissions

Engagement

WHO ARE YOU REACHING? WHAT IS YOUR ONLINE BASE?

Followers

Views

It's possible to measure all sorts of different things—but that doesn't mean that they're all useful. It's important, especially for a campaign, to define what you're going to track based on the real questions you want answers to. Take a moment to define three important questions for your campaign—perhaps looking back at what you said in Worksheet 5 would mean success for your campaign and think about how you could evaluate that. *For more detailed information on metrics, see our article, "Measuring the Effectiveness of Your Online Communications." [http://www.idealware.org/measuring-online-communications]*

1. _____

2. _____

3. _____

SOME EXAMPLES OF USEFUL QUESTIONS

- Did my campaign result in the number of attendees (or donations, or signatures) that we hoped for?
- Which channel was the most effective at driving conversion?
- Do people who are more engaged actually donate more?

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Pick one question from the above three to focus on for the moment. Thinking about the list you brainstormed in the diagram, what six specific metrics do you think will be most useful to track to answer the question? List them below. Aim to choose at least one from each level of the pyramid.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

As you start the campaign, it's useful to take a stab at defining what success would look like at the end of the campaign. You'll learn a lot more about what's working and what's not if you track your ongoing progress toward a defined baseline for success. For some of these, you may know what success looks like; for others, if nothing else, if you take a guess for this campaign you'll then know how good your guess was for the next campaign.

So, for each of these six metrics, approximately what numbers would mean that you were successful?

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

These six metrics will form the core of what you will track during your campaign. We recommend you track your metrics in a spreadsheet moving forward, and then, at the end of the campaign, check in as to what happened compared to your expectations. Think of measurement as a cycle; what you learn at the end of one campaign will be very useful in the beginning of the next.

THINKING ABOUT ATTRIBUTION

If you're using multiple channels, it can be difficult to figure out what causes your constituents to do what they do—in other words, was the increase in donations you received due to the direct mail you sent, your eNewsletter, your Facebook posts, or the weather? Trying to link an effect back to a cause like this is generally called "attribution."

Understanding what affects you can be attributed to what activities allows you to focus your time and energy on the things that are most likely to work. Unfortunately, it's a complicated area. There's no one, magic way to track attribution, but let's consider a few different approaches.

Most simply is the idea of "lift," which is basically measuring the difference between what is normal and what is a result of your action. Let's say you send out an email and in response receive a number of donations—"lift" is the difference between how many donations you estimate you would have gotten without the email and how many you got with it that you can attribute directly to that action.

Measuring lift works best if you're only using a single channel or communication at a time, and requires a good understanding of what your typical measurement is.

A more sophisticated way to measure attributions is with "tagging." Let's say your goal is to drive people to a web page where they can donate or learn more about your organization or event, and you're promoting the web page on social media and through direct email—how do you know which channel drove the most traffic? By tagging each communication, or giving a slightly different web address on each channel, you can then tell which effort was responsible for each visitor.

Google Analytics and similar tools make this process easy by allowing for parameters in a web address—for example, *www.idealware.org?email* and *www.idealware.org?facebook*. Both addresses take visitors to *www.idealware.org*, but Google Analytics tracks them differently by treating the question mark and word that follows it as a parameter.

A lower-tech way to accomplish this same goal is to ask visitors to the website how they learned about it with a dropdown menu, or by including a different promotional code in each channel's communication.

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SECTION 3: THINKING ABOUT MAINTENANCE

Running campaigns shouldn't be the only purpose of your communications. As mentioned in the last section, campaigns are waves of activity—but you also need a solid waterline so your communications don't just run dry when you're not engaged in an active campaign.

You need a steady stream of content to help supplement your campaign-related activity and maintain your brand. Posting photos, sharing articles, and simply giving your followers a better idea of your organization's culture and mission keeps unique content in the mix and keeps followers from feeling overloaded with event invites or campaign-related asks for donations.

In between campaigns you have to maintain your communications practices—a healthy maintenance strategy will help keep an engaged follower base that's' ready to listen and respond when your next campaign kicks off.

In this section we'll look at defining a solid, integrated communications mix for your maintenance periods with the following worksheets:

12. **Brainstorming Maintenance Possibilities**. How can you keep your audience engage between campaigns? This worksheet helps you plan out the types of communications you might use during maintenance periods.

13. **Planning Your Maintenance Content**. This worksheet helps you plan out the content for maintenance period communications.

14. **Scheduling Maintenance**. Use this worksheet to think through the possibilities for when to plan a maintenance period.

15. **Measuring Maintenance**. A maintenance period is a great time to try new techniques, because you have less on the line than during a campaign. But if you don't measure the effectiveness of these new practices, you can't know whether they're worth implementing. This worksheet helps you think through measuring.

12. BRAINSTORMING MAINTENANCE POSSIBILITIES

Ongoing communications can start to feel stale if you fall into a static routine, and creativity can get lost in the monotony of using content to "fill holes" on all your channels. Thinking strategically about your maintenance mix content can liven up your communications and keep people engaged, even without a unifying campaign. But even in the midst of a campaign it's important to continue to establish your voice and style with maintenance content and stay true to your overall mix.

What are some things you do now that you would consider maintenance? Which of the four categories of communications (promoting, curating, creating, community building) would each fit in? For example, do you:

- Share interesting articles not necessarily related to a campaign? (Curation)
- Start conversations with followers? (Community Building)
- Post stories about clients? (Creation)
- Share announcements about ongoing events? (Promotion)

In the table below, list some of your current maintenance activities:

WHAT DO YOU CURRENTLY DO?	WHAT CATEGORY? (Promoting, Curating, Creating, Community Building)

You should have goals for your maintenance period just as you do for a campaign. Almost everyone wants to make sure their maintenance helps to maintain and build their audience, so we've filled that out for you, but what are three other things you hope to accomplish with maintenance?

1. Maintain and Build Audience

2.

3.

4.

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Based on those goals, are there other things you could or should do? Use the chart below to brainstorm maintenance possibilities for each of the four types of content. Remember, your maintenance mix is the perfect time to experiment with new and unique content. Try and think of at least one "out of the box" type of message you could create for each category.

CREATING
Sharing original content of use to your community (like blog posts, stories, quotes from events, multimedia, etc...)

COMMUNITY BUILDING
Engaging people with the goal of building your community (like asking questions and thanking people, etc...)

CREATING | COMMUNITY BUILDING

PROMOTING | CURATING

PROMOTING
Asking your constituents to do something (like attend an event, donate money, sign a petition, etc...)

CURATING
Sharing your peers' articles and materials (like a link to an interesting article or a blog post featuring someone else's multimedia, etc...)

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13. PLANNING YOUR MAINTENANCE CONTENT

Take the brainstorm you did in the last worksheet and break it down into an action plan. Say for the moment that you're not running any campaigns at all—what would your communications mix look like just for maintenance?

First, decide what four channels you are most likely to be using on a consistent basis, and write them into the headers of each of the tables below.

Then, consider how many times each week or month you plan to use each channel. Indicate volume on the chart as well.

CHANNEL: Example		
VOLUME: Twice Daily		
What Will You Post?	What Category?	How Often Will You Post?
Ask a question	Community Building	2x per week
Post a useful resource	Curating	2x per week
Announce Training	Promotion	2x per month
Announce Reports and Articles	Promotion	4x per month

Finally, think through your action plan for that channel. What will you use it for? What category is it in? And how often will you do it?

CHANNEL:		
VOLUME:		
What Will You Message?	What Category?	How Often Will You Post?

CHANNEL:		
VOLUME:		
What Will You Message?	What Category?	How Often Will You Post?

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CHANNEL:		
VOLUME:		
What Will You Message?	**What Category?**	**How Often Will You Post?**

CHANNEL:		
VOLUME:		
What Will You Message?	**What Category?**	**How Often Will You Post?**

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14. SCHEDULING A MAINTENANCE WEEK

Now it's time to dive into the details of a week for an ideal maintenance schedule just as you did for a campaign. Assume, as you did in the last worksheet, that you're in a quiet period during which you're only doing maintenance.

Fill out the table below. Create a box for each message on each channel, and use the volume you identified in the previous worksheet to guide the number of boxes you create.

Again, keep an eye on the balance. Is there a good mix of different channels and categories?

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		Regular eNews Campaign Emphasis		Blog- Article Emphasis		
		TW- eNews Reminder	TW- Article Reminder	TW- Mention blog		
	TW- Resources	TW- Resources		TW- Resources	TW- Resources	
	FB- Question	FB- Poll	FB- Photo	FB- Video	FB- Question	
	FB- Resource	FB- Reminder eNews	FB- Article Highlight	FB- Discount	FB- Blog Reminder	

Sun	Mon	Tue	Wed	Thu	Fri	Sat

15. MEASURING YOUR MAINTENANCE

Your maintenance period is a great time to experiment with different possibilities and to try to answer smaller questions. But as with a campaign period, it's hard to define what's working if you don't measure it.

Take another look at the diagram below and reconsider what it might mean for your maintenance period. Some levels (like Views, for instance) might mean pretty much the same thing as in a campaign. Others, though, like Conversion, might mean something different. In a maintenance period, what actions do people take—maybe signing up for ongoing activities, or participating in programs?

Jot down your thoughts in the diagram below.

What could you measure during maintenance?

ARE PEOPLE ACTING TO HELP YOUR ORGANIZATION?
Example: donating, volunteering, signing a petition

Conversion

ARE PEOPLE INTERESTED?
Example: comments, shares/forwards, submissions

Engagement

WHO ARE YOU REACHING? WHAT IS YOUR ONLINE BASE?

Followers   **Views**
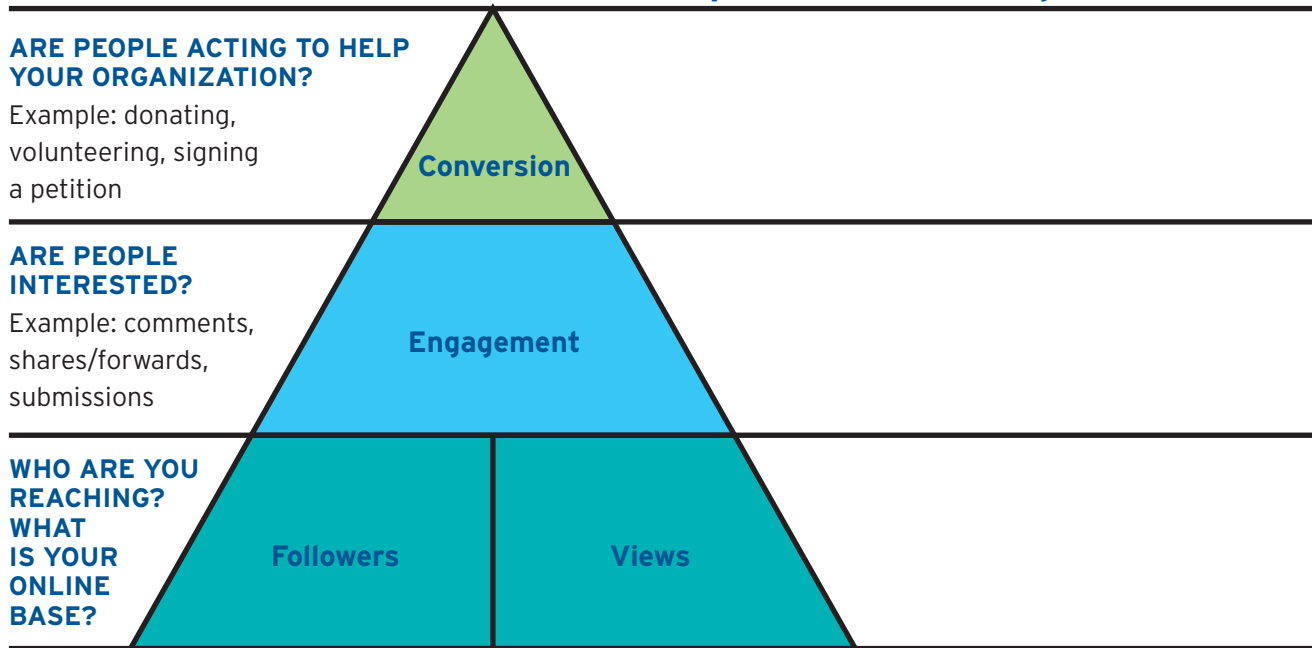
Take a moment to define three questions that you want to answer in the short term in a maintenance period. As we mentioned above, it's a great time to take a look at more specific tactical questions about your communications.

1. _____

2. _____

3. _____

Pick one of the questions above to concentrate on. Thinking about the list you brainstormed in the diagram, what six specific metrics do you think will be most useful to track? List them below. Aim to choose at least one from each level of the pyramid.

1. _____   4. _____

2. _____   5. _____

3. _____   6. _____

It might be useful to define a maintenance "cycle"—for instance, to check in at the end of each month on your maintenance metrics and see whether you can answer your questions. If you can answer them fairly definitively, it's time to define new ones.

Just as in a campaign, you'll learn a lot more about what's working and what's not if you track your expectations and then compare them to reality. For each of these six metrics, what would you expect to see at the end of a month?

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

SECTION 4: PUTTING IT ALL TOGETHER

Now that you have strong idea of what is involved in your campaigns, and your ongoing maintenance, it's time to put them together to create a cohesive plan for your next few months of communications.

16. **Putting Together an Integrated Week**. This worksheet helps you pull together the entire integrated communications package for a week, including any campaigns you're running, any maintenance periods, and how they all fit with one another.

17. **Defining Your Long Term Plan**. Use this worksheet to think about how your ongoing communications fit with upcoming campaigns to give you a longer-term picture of what your communications calendar might look like.

18. **Putting it Into Practice**. Who needs to be involved and what needs to be done to put your integrated communications plan into practice?

16. PUTTING TOGETHER AN INTEGRATED WEEK

You've thought about a campaign, and you've thought separately about maintenance. But in practice you're often trying to juggle multiple things at the same time, like a campaign or multiple campaigns while filling in the gaps with maintenance. This isn't as complicated as it might seem at first glance. You already have all the tools you need to map it out.

On the now-fairly-familiar looking chart on the next page, plan out an actual week of combined campaign and maintenance. Pick one of the weeks from the campaign you've already defined and add in maintenance.

Start by picking the week you want to map out from your week-by-week plan in Worksheet 9. A week in the middle of the campaign might make sense—you'll want to pick one where your communications aren't completely maxed out just from the campaign, so there's room for some maintenance as well. Using the same thought process as you used in Worksheet 10, map out the campaign communications for that week in the calendar on the next page.

Use the same notation to create a box for each message—remember, a message can mean an email, direct mail, post, phone call, or any other communication—with the channel, description, and color coding for the category.

Then add elements from your weekly maintenance plan, referring to Worksheet 14. The volume of messages is likely going to need to decrease from what you defined to make room for the campaign—for instance, if you're already sending two emails related to the campaign, it may not be a good idea to send out another regularly scheduled one. Also consider trying to preserve a reasonable distribution of categories of messages in choosing which maintenance posts remain in the mix.

This will likely be a process of give and take. How can you best make sure you're not overwhelming people with too many unwanted communications? How can you continue to engage people who may not be interested at all in your campaign? What's the right balance of channels and types of messages for you?

ARE YOU SERIOUSLY RECOMMENDING I DO THIS FOR EVERY WEEK?

Well, no. It's helpful to think through all these steps as you get your head around the process of integrating your communications, but it likely won't be worth the time to
map out every single week
like this. If you have a particularly complicated campaign or week, though, these worksheets and tools are always available to you.

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Sun	Mon	Tue	Wed	Thu	Fri	Sat

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17. DEFINING YOUR LONGER TERM PLAN

It's time for the final frontier. The reality is that your organization may have more than one campaign going at the same time—and if it does, you need to think about how they fit together. For example, you don't want to have three campaigns in two months and then go three months without one.

First, think about what campaigns you're planning over the next four months. List them out in the right hand side in the table below—the first two already there are examples to show you the format. (If you're only planning one campaign in this period, you're in luck!)

For each campaign, draw a line from when the campaign will start to when it will end. Is it at the start, middle, or end of a given month? Then put stars beside points of high-intensity posting. Do the same for each of your campaigns. As you plan it out, look at the balance—are your campaigns well spread out?

	Month 1	Month 2	Month 3	Month 4
Campaign: Example	◯————	⭐————	————	⭐ END
Campaign: Example		START ————	⭐ END	
Campaign:				
Campaign:				
Campaign:				
Campaign:				
Campaign:				

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18. PUTTING IT INTO PRACTICE

Congratulations, you've got a plan. Now to put it to use—how do you apply it in the real world? Think back to the first worksheet. Who needs to be involved in making your communications plan a reality?

Who's in charge of your overall communications and the plan you just created?

_____

Who will have an ongoing role in strategizing or reviewing communications?

Person

_____

_____

_____

_____

Role

_____

_____

_____

_____

Who will be in charge of each of your communications channels?

Person

_____

_____

_____

_____

_____

Channel

_____

_____

_____

_____

_____

Who else will you need to get input from as you think through your ongoing communications?

Person	What will they have input on?
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

What people listed above will make up your core communications team? Star them in the charts above.

Now that you have identified your team, what are your next steps? How will you roll out the plan at your organization? Think through whether written documents, a staff meeting, or individualized training—or some combination of the three—makes the most sense for your organization.

_____

_____

_____

_____

Just creating the plan isn't likely to be enough. How will you build buy-in among the staff who need to implement the day-to-day plan?

_____

_____

_____

_____

How will you make sure the plan continues to be implemented moving forward? When things get busy, often new or complicated things are the first to go. What kind of checks and balances could you create to ensure that people continue to implement the communications plan?

_____

_____

_____

_____

Updating the plan will ensure that it continues to match with the goals and processes of your organization. When will you plan to update your plan? How will you collect suggestions or issues in the interim?

_____

_____

_____

_____

Unfortunately, a full communications strategy comes at a cost. Think through what money or resources you will likely need to allocate to make your plan a success.

_____

_____

_____

_____

Often we find that internal politics can derail the best-laid plans. What potential barriers to implementation exist for your organization? List them below. How might you be able to avoid this conflict before it occurs, or stop the problem if it occurs?

Barriers

Potential Solutions

APPENDICES

AUTHORS

Laura S. Quinn, Founder and Executive Director

Laura has been working in the software sector for more than 15 years. As Idealware's Executive Director, she directs Idealware's research and writing to provide candid reports and articles about nonprofit software. Prior to Idealware, Laura founded Alder Consulting, where she helped nonprofits create Internet strategies, select appropriate software, and then build sophisticated websites on a limited budget. She has also selected software, designed interfaces and conducted user research for multi-million dollar software and website implementations with such companies as Accenture and iXL. Laura is a frequent speaker and writer on nonprofit technology topics.

Andrea Berry, Director of Partnerships and Learning

Andrea oversees Idealware's training activities and curriculum design. Prior to joining Idealware, Andrea held fundraising positions in education, health research, and museums and has taught math, performing arts, and history in traditional and non-traditional educational settings. She brings a breadth of experience with fundraising software, particularly as it relates to small nonprofits, and has worked as a consultant with nonprofits across New England to help identify appropriate donor management software. Additionally, as a former teacher, Andrea brings front-line tested expertise in curriculum development and training.

Elizabeth Pope, Director of Research and Operations

Elizabeth Pope leads Idealware's software research projects, conducting interviews and product demos, writing articles and reports, and helping to design project methodology. She earned an M.S. in Library and Information Science from the University of Illinois at Champaign-Urbana, where she honed her research, instruction and tech skills. Before moving to Maine, Elizabeth worked in archives and libraries in New York City for several years. Her background also includes fundraising and content development for nonprofit organizations.

Tyler Cummins, Marketing and Learning Associate

As Idealware's Marketing and Learning Associate, Tyler lends a creative eye to a variety of training and marketing materials, crafting new slides and polishing the tried and true wisdom of his colleagues. Tyler began as a research intern, writing and editing articles and blog posts and contributing to the 2013 *Field Guide to Software for Nonprofits*. A graduate of Alfred University, he brings to his role at Idealware his experience as a writer and a lifelong love of technology.

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ABOUT IDEALWARE

Idealware, a 501(c)(3) nonprofit, provides thoroughly researched, impartial and accessible resources about software to help nonprofits make smart software decisions.

Nonprofits maintain a complicated relationship with technology. Most know that software can streamline their processes and help fulfill their missions more efficiently and effectively, yet lean staffing and tight budgets mean they're unable to devote the time necessary keep up with new technologies and find the right tools.

From the most basic questions (like how to use software to help manage emailing hundreds of people at once), to the more complex (like understanding the role of social networking and mobile phone text-messaging in fundraising strategy), organizations need a trusted source for answers. Idealware provides an authoritative online guide to the software that allows U.S. nonprofits—especially small ones—to be more effective. By synthesizing vast amounts of original research into credible and approachable information, Idealware helps nonprofits make the most of their time and financial resources. And, our reach is expanding! Our reports have been downloaded hundreds of thousands of times.

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CONSULTANT DIRECTORY

It often makes sense to hire a firm to help you define or implement an integrated communications strategy. To help you find the right consultant for you, we've compiled a number of the organizations and individuals that offer services in this area.

These are paid listings; each firm paid a sliding scale fee to be included based on size. Those with logos and descriptions paid more for these elements to be included. Idealware has not assessed the services provided, but only aggregated the information given to us by the firms. Conduct your own due diligence before hiring any consultant.

NEW ENGLAND

Community Organizer 2.0

communityorganizer20.com

Waltham, MA

We specialize in online and social engagement strategy including strategy development, community building, campaign development, social media audits, and ongoing training and coaching.

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Firefly Partners

www.fireflypartners.com

Boston, MA

Firefly Partners is a creative services company offering design, strategy and custom development expertise to nonprofits. Our team delivers creative, high-quality solutions that get results.

Maureen Wallbeoff, 860-383-8332 or info@fireflypartners.com

Heller Consulting

TeamHeller.com

Boston, MA

We help nonprofits streamline and maximize their use of software for fundraising, mission management, and community outreach. We specialize in software selection, implementation and optimization.

Keith Heller, 510-841-4222 or info@teamheller.com

Jazkarta

jazkarta.com

Boston, MA

Creating websites and web applications with open source software. Experts in advanced content management systems, Salesforce.com integration, cloud computing, and agile development.

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LW Robbins

www.lwra.com

Holliston, MA

LW Robbins is a direct response fundraising agency devoted to helping nonprofits acquire and cultivate loyal donors, and raise more net income through a blend of traditional and digital channels.

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Database Designs	**www.dbdes.com** **Boston, MA** Steve Backman, 617-423-6355 or info@dbdes.com
RTF Consulting	**www.linkedin.com/in/rtfelton** **Amherst, MA** Robert Todd Felton, 413-320-3923 or rtfelton@gmail.com
Schwadesign, Inc	**schwadesign.com** **Boston, MA & Providence, RI** Josh Silverman, 401-427-0270 or work@schwadesign.com

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Public Voice NY

www.publicvoiceny.com

New York, NY & Brooklyn, NY

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Simha Rosenberg, 917-667-1099 or simha@publicvoiceny.com

Sanky Communications, Inc.

www.sankyinc.com

New York, NY

Sanky Communications, Inc., provides integrated fundraising for non-profits, developing comprehensive, creative, and targeted direct mail and online fund-raising campaigns for non-profits worldwide.

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Tuttle Communications

www.christuttle.com

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Founder, Chris Tuttle, has over 15 yrs experience with over 100 organizations developing online engagement strategies that build better relationships, engage users to take action, & raise more money.

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MID ATLANTIC

Beaconfire

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Arlington, VA

Beaconfire integrates compelling vision, clever ideas, creative design, and leading-edge Internet technologies for their clients to produce websites and online campaigns that shine.

Andrew Dimock, 571-814-2209 or andrew.dimock@beaconfire.com

Chapman Cubine Adams + Hussey

www.ccah.com

Arlington, VA

We're driven by the question, What's Next? What's next in multi-channel marketing? We embrace new ideas, innovative solutions and creative tactics that help our clients break through the clutter.

Kim Cubine, 703-248-0025 or info@ccah.com

Heritage Consulting Inc.

www.heritageconsultinginc.com

Philadlephia, PA

Heritage Consulting Inc. assists history & heritage organizations nationwide to market, promote and revitalize downtowns and threatened historic places. Email us about your project.

Donna Ann Harris, 215-546-1988 or donna@heritageconsultinginc.com

Impact Communications

www.impactdc.com

Washington, DC

Impact Communications helps you tell the world your story and raise funds to advance your mission through direct mail, multi-channel, email, case statements, annual reports, newsletters and more.

Kathy Swayze, 202-543-7671 or connect@impactdc.com

Knowledge Advisory Group

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