

amec

Planning Worksheet

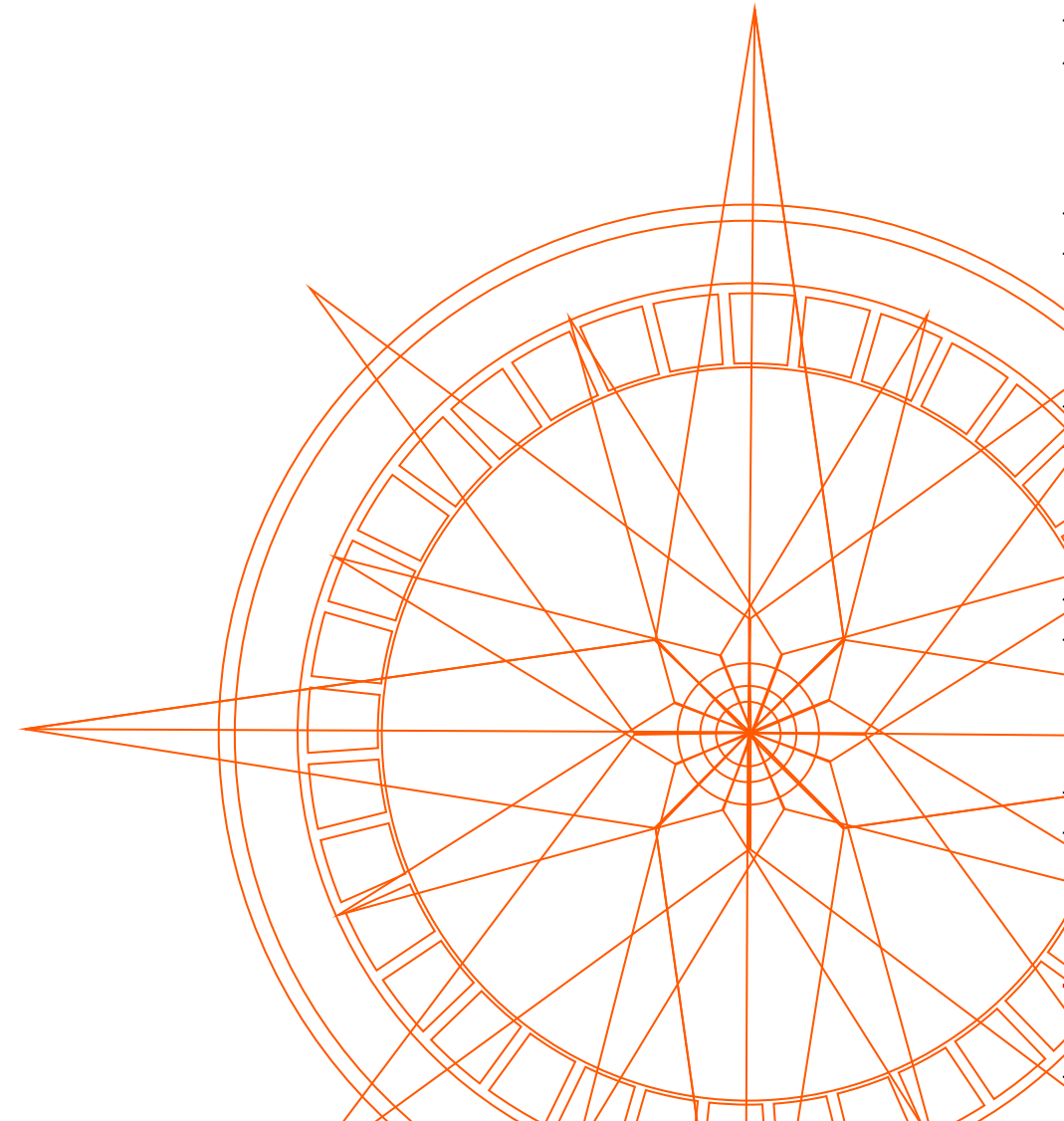
A guided tool for using the Integrated Evaluation Framework for communication planning

AMEC is passionate about planning, because work that is planned is easier to measure and most importantly, garners better results.

Planning is ultimately a creative endeavour. It's one that is grounded by research and fuelled by insight – both spaces AMEC members are very familiar with. And it's crucial to creating more successful work because done correctly, it defines the bullseye for great work.

But how do you make that leap – from what you know from research to what you need to do?

This document, alongside our planning content housed with the [Integrated Evaluation Framework](#), will walk you through how AMEC Integrated Evaluation Framework – our flagship measurement strategy tool – can help you to plan your campaigns, plans and programmes too.



The following pages walk through three steps:

Starting at the end: Defining the why

On this page we ask you to consider where you want the campaign to end; what are the desired results?

Based on this you will need to fill in two boxes: First, what is the business impact you're trying to achieve, and how can communications realistically contribute towards it? Second, what is the human problem you're trying to solve? Or phrased another way, why is this communication plan needed?

Research, audience targeting and planning

On the second page, you will provide the summary of any research you've done to answer questions about your target audience, and your key insight about them. You'll then summarise your strategy using the GET/WHO/TO/BY framework.

Aligning objectives and activities

Finally, you will check that your campaign aligns across strategy, objectives and activities.

Organisation

Impact

What do you want people to do differently as a result of what you are planning to do? Why?

What results will be caused, in full or in part, by your communications? E.g.

- Reputation
- Relationships
- Compliance/complying actions
- Organisational change
- Public/social change

Example Metrics & Milestones

- Public support
- Meet targets
- Sales increase
- Donations increase
- Cost savings
- Staff retention
- Customer retention/loyalty
- Quality of life/wellbeing increase

What is the business imperative you're trying to support?

Audience Response & Effects

Outcomes

What do you want people to feel differently as a result of what you are planning to do?

What effects will your communications have on your target audiences? E.g.

- Learning/knowledge
- Attitude change
- Satisfaction
- Trust
- Preference
- Intention
- Advocacy

Example Metrics & Milestones

- Message acceptance
- Trust levels
- Statements of support or intent
- Leads
- Registrations
- Brand preference
- Trialing
- Joining
- Reaffirming

Out-takes

What do you want people to think differently as a result of what you are planning to do?

What will your audiences do with and take out of your communications? E.g.

- Attention
- Awareness
- Understanding
- Interest/liking
- Engagement
- Participation
- Consideration

Example Metrics & Milestones

- Unique visitors
- Views
- Response (E.g. likes, tags, shares, retweets)
- Return visits/views
- Recall (aided, unaided)
- Positive comments
- Positive response in surveys
- Subscribers
- Inquiries

What is the (human) problem you're trying to solve?

Plan, Set Targets & Other Inputs

Target Audience
<p>Who will be your target audiences? E.g.</p> <ul style="list-style-type: none">▪ Define▪ Classify▪ Create personas▪ Identify pain points

Example Metrics & Milestones
<p>Demographics: age, sex, income, location, occupation, level of education, marital status</p> <p>Psychographics: interests, activities, attitudes and opinions</p> <p>Classify: Users, initiators, influencers, buyers, gatekeepers, decision makers</p>

Target Audience

Strategy
<p>What are the key inputs necessary to inform and prepare your communications?</p>

What are the human and business insights?

What is your strategy?
<p>GET</p> <p>-----</p> <p>WHO</p> <p>-----</p> <p>TO</p> <p>-----</p> <p>BY</p>

Align Objectives

Organisational Objectives	Communication Objectives				
<p>What are the overall objectives for your organisation?</p> <p>What are the business objectives your communications will need to support?</p>	<p>With a clear understanding of your “why”, what will be your SMART/ SMARTER objectives and targets? E.g.</p> <ul style="list-style-type: none"> ▪ What: determine a desired output, outcome or impact ▪ Who: specify one or several target audiences ▪ How much: explain how much the metric should change ▪ When: decide a timeframe in which the objective is to be achieved. 				
<p>Example Metrics & Milestones</p> <ul style="list-style-type: none"> ▪ Review your organisation’s Corporate / Strategic/ Business plan ▪ Review your organisation’s Vision/Mission/Values ▪ Refer to your analysis of desired impacts, outcomes and out-takes 	<table border="0"> <tr> <td style="vertical-align: top;"> <p>Output SMART objective</p> <p>To develop an instructive worksheet to enable use of the AMEC Integrated Evaluation Framework as a planning tool by members and communication professionals to coincide with the AMEC Virtual Summit in May 2021.</p> </td> <td style="vertical-align: top;"> <p>Outcome SMART objective</p> <p>To build confidence among all AMEC members in their ability to use the AMEC Integrated Evaluation Framework as a planning tool by December 31, 2022.</p> </td> </tr> <tr> <td style="vertical-align: top;"> <p>Out-take SMART objective</p> <p>To create awareness among all AMEC members of the AMEC Integrated Evaluation Framework as a planning tool by December 31, 2021.</p> </td> <td style="vertical-align: top;"> <p>Impact SMART objective</p> <p>To enhance AMEC’s reputation as the global leader in communication measurement and evaluation (as evaluated by members of AMEC) by December 31, 2022.</p> </td> </tr> </table>	<p>Output SMART objective</p> <p>To develop an instructive worksheet to enable use of the AMEC Integrated Evaluation Framework as a planning tool by members and communication professionals to coincide with the AMEC Virtual Summit in May 2021.</p>	<p>Outcome SMART objective</p> <p>To build confidence among all AMEC members in their ability to use the AMEC Integrated Evaluation Framework as a planning tool by December 31, 2022.</p>	<p>Out-take SMART objective</p> <p>To create awareness among all AMEC members of the AMEC Integrated Evaluation Framework as a planning tool by December 31, 2021.</p>	<p>Impact SMART objective</p> <p>To enhance AMEC’s reputation as the global leader in communication measurement and evaluation (as evaluated by members of AMEC) by December 31, 2022.</p>
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<p>Have you checked:</p> <p><input type="checkbox"/> Are your objectives SMART(ER)?</p> <p><input type="checkbox"/> Do they tie together with the Strategy you’ve developed?</p>					

Measure Activity

Outputs										
<p>What will you put out that is received by your target audiences?</p> <ul style="list-style-type: none"> ▪ Distribution ▪ Exposure ▪ Reception 										
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<p>Have you checked:</p> <p><input type="checkbox"/> Do your outputs + activities support the Strategy you’ve developed?</p>										

Notes

The key steps, metrics and milestones are not exhaustive, and not all are required in every program. They are indicative of common and typical approaches to evaluation of public communication such as advertising, public relations, marketing communication, etc. Practitioners should choose relevant metrics and milestones and methods, ideally selecting at least one at each stage.

The arrangement of inputs, activities, outputs, etc. should not be interpreted as a simple linear process. Feedback from each stage should be applied to adjust, fine-tune, and change strategy and tactics if necessary. Planning and evaluation are iterative processes.

