

SmartChart

Step 1. Program Decisions
Broad Goal: What do you want to achieve over the long term?
Objective: What's the first measurable step you need to accomplish within the next 12 months to move toward your goal?
Decision Maker: Who can make your objective a reality by taking a specific action or changing a specific behavior?

Step 2. Context			
Internal Scan: What are your organization's assets and challenges that may impact your outreach strategy (budget, staffing skills, resources, reputation, etc.)?			
Assets:			
Challenges:			
External Scan: What is already happening outside your organization that may impact your strategy (e.g. timing of the issue or events, activities of other organizations in this space, barriers audiences may face to taking action, other potential obstacles or opportunities)?			
Assets:			
Challenges:			
Define Your Position: Do you need a plan that will frame, fortify and amplify, or reframe the debate?			
<table border="1"> <tr> <td>Frame – no one is talking about your issue</td> <td>Fortify and Amplify – you like the direction debate is heading and want to push it further</td> <td>Reframe – you want to change the discussion about your issue</td> </tr> </table>	Frame – no one is talking about your issue	Fortify and Amplify – you like the direction debate is heading and want to push it further	Reframe – you want to change the discussion about your issue
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Step 3. Strategic Choices				
Decisions to Make	Audience 1	Audience 2	Audience 3	Reality Check
Audience Target: Who must you reach to achieve your objective?				Who can most help you achieve your objective? Think small – segment your audience as much as possible. This is not the general public. Your audience may be your decision maker, or it may be the people who can help influence your decision maker.
Readiness: Where is your audience on your issue? Are they ready for what you want to tell them?	1. sharing knowledge 2. building will 3. reinforcing action	1. sharing knowledge 2. building will 3. reinforcing action	1. sharing knowledge 2. building will 3. reinforcing action	If they don't yet know about, care about and believe in your issue, check 1. If they know, care and believe, check 2. If they have already taken action and are ready for next steps check 3
Core Concerns: What existing belief or value can you tap into to engage and resonate with your audience? What existing belief might be a barrier you have to overcome?				What does the audience believe? Where's their comfort zone? Note lifestyle considerations (e.g. to get parents to an evening meeting you may need to provide childcare). Understanding these factors will help you make the issue personally relevant for the audience.
Theme: Your theme will guide solid messaging that reaches your audience and reinforces the core concern you want to tap. (e.g. pocketbook issues, values, family)				Select a theme that matches the audience's values, not your own. Offer hope for change Consider the emotion you want to evoke and the tone you want to strike. Happy, mad, excited and hopeful are all motivating emotions, while emotions like guilt, shame or fear tend to be disempowering.
Message: What key points do you want to make with each target audience?				Make sure your messages: Are based on the audience's core concerns; Overcome – rather than reinforce – their barrier; Have an ask that is in their comfort zone (or offers a benefit that outweighs the risk); Emphasize reward and convey hope toward success; and Are consistent with your chosen theme
Messengers: Who will best connect with the audience? Who is the social reference group on your issue? Can you show them a trusted leader taking action?				People listen to people, not institutions. Make sure your messenger is credible. The right message delivered by the wrong messenger may fall on deaf ears.

Step 4. Communication Activities			
Tactics: What activities will you use to deliver your messages to your target audience(s) (e.g. meetings, web sites, newsletters, press events, letters, phone calls, paid advertising)? Don't forget to consider organizational capacity.	Timeline: When will you implement each tactic? Note key dates, deadlines and events. Be realistic – you can't communicate with audiences 24/7. Note natural opportunities when your audience is most likely to be attuned to and act on the issue. Plan ahead for the unexpected – sometimes events beyond your control can be a chance to connect with your audiences. Use a timeline to plot out all the steps that go into each tactic listed.	Assignments: Who will implement each activity noted in the timeline.	Budget: How much time and money will you spend on each tactic? Be realistic about what you can accomplish given available resources.
Audience 1 Tactics			
Audience 2 Tactics			
Audience 3 Tactics			

Step 5. Measurements of Success
Outputs: What will you produce to reach your objective (e.g. emails sent, events planned, phone calls made)?
Outcomes: What is the result of your outputs that demonstrates incremental progress toward your objective (e.g. increased donations, positive editorials, new members)?

Step 6. Final Reality Check
<p>Before you put your chart into action, test for accuracy by asking yourself the following questions.</p> <p><input type="checkbox"/> Is the strategy doable?</p> <p><input type="checkbox"/> Are your resources in line with your strategy? Does your internal and external scan support the decisions you've made?</p> <p><input type="checkbox"/> Are you motivating the right people to take the right action at the right time?</p> <p><input type="checkbox"/> Are your choices consistent? Does the logic flow from one box to the next? (Tip: Try testing your decisions backwards – i.e. by accomplish these tactics using these messengers, we will deliver these messages, support this theme, tap into these values, move this target audience, etc. Does this logic work as well in reverse as it did when you worked through the chart? If not, go back and address trouble spots.)</p> <p><input type="checkbox"/> Will the tactics move you towards your objective? Will they reach the appropriate audience(s)?</p> <p><input type="checkbox"/> Are you using the best persuasion practices, such as respecting the audience's lifestyle, sharing hope, making them the hero, positioning the issue within the social norm, etc?</p> <p><input type="checkbox"/> Are there any assumptions or guesses built into the plan that require further research to confirm or correct?</p> <p><input type="checkbox"/> Is there buy-in from your organization to implement the plan?</p> <p><input type="checkbox"/> Are there other objectives you need to SmartChart to ensure you're taking a comprehensive approach to meet your overall goals?</p> <p><input type="checkbox"/> Can you measure progress?</p>
If you answered no to any of these questions, go back and work through your choices again. And remember, you may have other objectives you need to SmartChart separately to ensure you're taking a comprehensive approach to meet your overall goals.