

The Perks and Pitfalls of Strategic Communication Planning: A Q&A with Caroline Kealey

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How do you build a strategic communication plan that can withstand the rapid-fire changes going on in politics, business and technology?

CW Senior Editor Jessica Burnette-Lemon asked Caroline Kealey, internationally recognized strategist and change facilitator and winner of a 2016 Gold Quill Best of the Best Award in Change Communication, about the value of strategic planning and how to avoid the pitfalls of the process.

In addition to her role as principal of Ingenium Communications, Kealey also serves as the lead instructor and program director for the University of Ottawa's Institute for Strategic Communications and Change. She is the developer of the Results Map™ best practice process for strategic communications and change planning, a step-by-step methodology designed to help communicators become more strategic and elevate their contributions to the next level.

Jessica Burnette-Lemon: Why is strategic communication planning important?

Caroline Kealey: What has always stood out for me is that strategic communication planning is a catalyst for alignment. It's all about creating the conditions for an organization to have some intentionality about its communication function—to answer vital questions such as why we are communicating, who are the priority audiences and why

they are important, what message we want to bring to life, what channels will be most effective, and finally, how we'll know if we've been successful.

Strategic communication planning is also an invitation to undertake a discovery exercise—research the communication landscape, explore ideas for innovations or benchmarking and plan a course forward based on the best insights and evidence available. It's the perfect antidote to the reactive, short-term nature of the communication discipline, and it's the space where we can really become indispensable to the organizations we serve.



Caroline Kealey

Eisenhower said it best: “In planning for battle, I've always found plans to be useless, but planning is indispensable.”

JBL: What do you think is the most important element of strategic planning? What makes the biggest impact?

CK: To me, strategic communication planning is all about the process itself, not the document it produces. It's about cultivating a laser-like focus on what success looks like, and then considering every step you need to take in order to get there.

In our Results Map process, we think in terms of the main “junctures” of Prepare, Plan, Implement and Evaluate. The sequence is not accidental—it's a constant reminder that you cannot advance to the next step until you've completed the first one. For example, the reason why most messaging tends to be, well, frankly “vanilla mush” is that it's not crafted through the lens of careful audience definition and analysis. There's a reason for a step-by-step approach, and there is no fast-forward button.

JBL: In an era of constant change in business and technology, how do you make a plan that will continue to be relevant?

CK: Trying to execute a strategic communication plan in a world that keeps changing can be extremely difficult. In some cases, it's the wrong thing to do, because the situation you started with may have changed so drastically.

That's why we focus on objectives and performance indicators as the bookends of our planning process. To the extent that these are nailed down, the rest will fall into place. I encourage clients to invest heavily in clarifying what success looks like in a solid statement of objectives, which then functions as the North Star in directing approaches, messaging and tactics in alignment with that clear direction. The associated performance indicators keep us on track so that we can assess in real time what's working and what's not, in order to make course corrections accordingly.

Generally speaking, I think that as communicators, we have to spend a lot more time thinking about how we can be both strategic and agile. We have to hold these two ideas in our minds at the same time, so we can be flexible and responsive in our approach, while remaining totally focused on target objectives.

JBL: What are some of the pitfalls of strategic communication planning and what advice do you have for avoiding them?

CK: There are three main pitfalls I see regularly:

The first is an inadequate, or absent, consultative and research process. I would say that if you're developing a communication plan alone at your desk, you're doing it wrong. By definition, communication planning is a creative, participatory process that has to involve meaningful engagement with organizational partners, such as internal clients, executives and stakeholders. If you want to make bold recommendations to try something new, you have to be prepared to back up your approach in research and evidence.

Another big pitfall we see is over-building a plan. A strategic communication plan has to be scaled to fit the project management parameters of time, money and human resources. If you only have a part-time staff member and a US\$5,000 budget, then it doesn't make sense to plan out an elaborate international speaking tour and digital outreach program. You need to keep your eye on the ball and do the best you can with the cards you've been dealt. In some cases, you actually use your strategic communication planning process to make a business case for additional resources.

Finally, evaluation is often totally overlooked, or is badly undertreated. This really undermines the value and overall credibility of the strategic communication plan. An evaluation framework doesn't have to be complicated or elaborate to be solid—think in terms of a “chain of evidence” of indicators that will let you know if you're on track, so that you can correct course as needed. Generally, communicators would do well to focus much more on an evaluation framework's performance indicators (i.e. “what” you want to measure, such as the tone of content) as opposed to the tendency to zoom in only on measurement tools (i.e. “how” you'll measure, such as content analysis).

Leading a strategic communication planning process is probably one of the most meaningful, exciting contributions a communicator can make. We should step up and celebrate this opportunity more often, because it's the space where we can really make a lasting difference.



Jessica Burnette-Lemon

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