

Strategic Communications Planning: Lessons from a UC Davis panel

Moderator:

Pamela Wu, Director, Media Relations and Communications, UC Davis Health

Panelists:

Elizabeth Forrest Lambert, Marketing and Communications Manager, Graduate Studies
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Caren Weintraub, Director of Communications, College of Agricultural and Environmental Sciences

What is strat comm planning?

AJ: Should be a difference between unit strategic plan and your plan. Coming from industry, didn't have one either. Really have to tease that out of leadership if it doesn't exist. Great that new chancellor is enacting one right away.

E: Asked to create strat comm plan, asked about strat goals and they didn't have any. Helped them create a strategic plan, which then helped her create strat comm plan.

C: Possible to create a larger comm plan, but also independent strategic plans.

Why create?

AJ: When he was hired, started from scratch so needed it. Also knew it from past experience. Alignment from leadership—report to four different AVCs. Knew that having a strategic plan would help from getting him pulled in too many directions. Helps to balance proactive instead of reactive mode. Makes my job easier.

E: Was expected. Role was vacant, so comms activities were occurring, but it was just from momentum. Not sure why and what effects were occurring. So, my first action was an assessment.

My first action was to put together a survey of our key people. Our coordinators and the grad students themselves. Gave us an idea of how channels were performing and how they preferred to be communicated with. Long process, so needed to keep leadership engaged.

C: It's a roadmap. Helps me to speak to leadership and my team and helps us stay focused. This is a way to make an argument for use of resources and budget, show metrics, and build trust with leadership.

I'm doing a departmental plan, it might be eight pages. There's a lot of different goals, objectives, tactics, measurements, sometimes timeline. Try to keep short and sweet, because I want people to read them.

E: Mine is about 22 pages, but includes a messaging guide. Uses core brand messages and adds messaging for

AJ: 50 pages, but built in PPT, so I can present it easily. A lot of it is reference points, data and other things that are of use to me, that aren't included in what I present to leadership. But size doesn't matter. A two-page comms plan can be enough. If it keeps you focused and gets you buy in, it could be enough.

How do you interact with leadership?

C: If it's smaller, I don't interact with leadership, just team. If it's for the department, I engage them. Just had a two-hour meeting on communications planning. Often people will come to me saying they need something specific, and I try to help them decide if that's the best tool for what they are trying to accomplish. I sat down with our Policy Council and Dean for the main plan. I also meet with faculty chairs and others to also make sure they are on board and their needs are accounted for. That way, when I lay out the plan, I know that we can all move forward together.

I also hold them accountable for budget. I am clear that I can provide the talent and work, but their budget needs to cover the deliverable. And I may also

E: What's not in the plan is just as important as what's in the plan. In mine, I acknowledge what would be great, but we don't have resources for. It's a time specific document. I address how we can build for the missing things in the future.

AJ: When I first arrived, I sent a meeting request to our leader for a kick-off meeting. It came back scheduled for two months later. That was a wake up call. What I did in the meantime is did as much research and interviewing as I could so that I walked in to the meeting informed and with data.

On the back-end, once you get the buy-in and agreement you can work a lot more independently because they trust you. You can work on just getting the projects done.

Any surprises?

C: We had a surprise recently. WFCB came and wanted to focus on undergrad experience. Wanted to reach undergrads, donors, etc. We started digging in—who's looking at your website. StratComm looked at site and determined that #1 visitor is prospective grad students, and they want to know what faculty they will be working with. Undergrad. Going to Undergrad Admiss site. But grad students really struggling to understand the situation will be if they decide to come here.

The Google Analytics and the data shifted their entire way of thinking. They got off of thinking about undergrad student recruitment and instead decided to focus on grad students and faculty. It also changed my focus as well.

E: One thing was a surprise and the other was a disappointment. Once grad students were on campus, they were disengaging with social—deleting their social connections to grad studies once they arrived on campus. Our pages weren't of value to them. We were bombarding them with too much email. Changed weekly newsletter to monthly. Wanted to make sure that when we had their attention we were respecting it and acknowledging their workload.

Greatest hurdle?

AJ: Leadership not having their own strategic plan. But wasn't a formal strategic communications plan for the campus. We used the marketing toolbox, but it didn't have everything. Dana is changing that.

Was also blown away by how large and complicated the communications networks were (list of all). Since we interact with many, I mapped it out. It really helped us out from keeping from duplicate efforts. Also, when I presented that to leadership it really woke them up to the situation I was operating in.

E: My goal isn't necessarily a metrics-based department. The goals are a little soft. So, our metrics aren't as deep as I'd like them to be. Developing them has been a challenge.

What was the outcome of the plan?

E: I have a big win to report. While ink still drying, my department putting in a budget proposal. They asked if I had anything, I had a position justified and laid out for a CRM digital comms specialist. They threw it in thinking it wouldn't get funded, but the programs wanted it, and now we are hiring that position.

C: If I've got something that is meaty enough I'll put together a short plan. We've been grappling with a complicated lawsuit for a couple of years. I wasn't thinking we'd need a plan, but right as we are going to trial, the opponents put out a statement about how awful we were. I realized we were behind the curve. We scrambled to address it in the moment, but it made me determined to get ahead. So, we created a plan. We embedded a communicator at the trial who was interacting with the players. We had an information communication plan. When the verdict came out, I wanted to be the first to the media and have our messaging straight. It was complicated because you need all sorts of buy-in and sign-offs, but we did it. We had a statement out within a 1 ½ of the verdict, and so our side got picked up in the media.

This is a specialized example, but it's applicable to whatever it is that you're trying to accomplish with communications.

AJ: We saw a benefit in having our plan when we went to redo our website. We had the direction and the messages and it made it a lot easier. We've gotten a lot of positive feedback, including a consulting agency that wanted to use our site as an example for clients.

Tips?

E: Don't be afraid to acknowledge the areas where you're going to need help in the future. A plan can serve as a great justification for a need.

C: I tend not to ask for permission; I tend to just do things. And it seems to work for me. As a communicator, it's our job to put together strategy and make things work correctly. So, I tend to come at it from a place of authority. So, I will get feedback and take that into account. But you know communications and you also know your department, so dive in and do it from a position of authority. And you might be surprised what you can get through.

AJ: Scale it appropriately. Don't get too intricate. Have someone from outside your world take a look at it, because we tend to get caught up in things and lose perspective.

Questions:

How did you balance building strategic plan and fixing things?

E: Since assessment portion was first thing, I could identify what was on fire and what we could approach later. Was upfront with supervisor that platforms were the priority and content would come later. Was all in plan.

AJ: We had the same issue. We needed everything. You can't say that we'll finish the plan then do it. I did an audit of key things and created key things. Some things are straightforward. Other things are about messaging. It's not a doc that's done all at once. Set phases, with agreement with leadership on priorities. Also, had to address resources.

Sometimes leadership has a heavy hand in communications. How do you introduce yourself to someone in a new leadership role and you can tell that they don't understand what it is to be a professional communicator. How do you articulate what you do?

C: Straightforward with patience. I articulate how I am trying to serve them—faculty tell story about their research.

E: Communicators can take their vision and turn it into reality. We did an assessment and found that we are great about coming with ideas, but then we don't tell anyone and get them involved, which is a critical aspect of success.

P: It's important for them not to just see you as a service provider who makes brochures. You have to show them that you can give them a strategy. And it probably is going to take a couple of successes before they take you seriously.

C: We need more project managers. It gets relegated to the program advisor who has 20% comms in her description, or to the IT person because she's updating the website. So, I try to provide as much resources as I can and get them to do as much as they can within the capacity of their role. So, for instance, I have someone who has this as part of their job, but because they aren't great at it, it's taking up too much time. So, I'm helping her become more efficient at it.

E: It is hard, because sometimes baby steps. If there are ways to get them engaged, it can make them understand better. Thank you to Susanne for majors blog. Has really opened up an opportunity to get my people to contribute and suddenly they start thinking about communications in a deeper way. Even smaller ways like a social takeover or a Facebook live can get them engaged.