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Creating a Communications Strategy

A communications strategy is a written plan that connects what your work needs to achieve with what you say, to whom, where, and when. Without one, communication happens anyway — it just happens reactively. A question arrives, so a post goes up. A competitor announces something, so you announce something. A slow week arrives, so the channels go quiet and the audience forgets the shape of your work until a busy week buries them in five messages at once. None of that is a character flaw. It is what communication looks like when every message is decided alone, at the moment it is needed, with no shared picture of the whole. Creating a communications strategy is how you replace that pattern with a deliberate one: a few pages, made once and maintained lightly, that every future message can be checked against before it goes out.

This lesson set teaches you to create such a strategy from nothing, in plain steps, whether you are starting a business, growing a nonprofit, launching a program, or steadying work that has existed for years on word of mouth alone. The method here is the general craft that sits underneath named systems like a strategy builder: first understand where you stand, then set goals that communication can actually move, then study the people you need to reach, then shape messages worth repeating, then choose channels and a rhythm, and finally measure honestly and adjust. Each stage produces a small, concrete piece of writing. Assembled, those pieces are your strategy — not a slogan, not a folder of old posts, but a working document that a new helper could read on Monday and use to draft a correct message by Friday.

Why does the written part matter so much? Because unwritten strategies drift. Ask three people in the same small organization what the organization is mainly trying to say this year and, without a written strategy, you will often get three sincere, different answers — and the public receives all three, interleaved, and concludes the work itself is unclear. Writing forces the disagreements into the open while they are still cheap to resolve: at a table, in a draft, before the audience has been confused. It also protects the work from memory and mood. On a discouraging week, the strategy reminds you what you decided the message was when you were thinking clearly. On an exciting week, it stops a shiny distraction from eating the month. A strategy is, in that sense, less a marketing document than a promise you make to your future self about what you will keep saying until it has had a fair chance to work.

Be clear about what a strategy cannot do, because honest limits are part of creating one that works. A strategy cannot make an offer people do not want, cannot substitute for doing the work well, and cannot guarantee attention in a crowded world. It will not go viral on command, and any plan that promises it will is selling you weather as if it were architecture. What a strategy genuinely does is narrower and more valuable: it makes your communication consistent enough to be recognized, relevant enough to be useful, and steady enough to be trusted — and it makes your effort measurable, so you spend next month’s hours on what this month’s evidence supports. That is the whole ambition of this lesson set, and it is enough to change how a small organization is heard.

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What You Will Learn

- What a communications strategy is, what it is not, and the six pieces every complete strategy contains.
- How to write an honest starting-point review of your current communication before planning anything new.
- How to set communication goals that are specific, measurable, and tied to what the work itself needs.
- How to research your audiences with simple, respectful methods that work without a budget.
- How to craft key messages, supporting proof, and a story bank that give your strategy its substance.
- How to choose channels, set a realistic rhythm, and assign ownership so the plan survives busy weeks.
- How to measure results in plain measures, review them on a schedule, and revise the strategy without starting over.
- How to write the finished strategy as a short document your whole team will actually read and use.

Lesson 1 — Start Where You Stand: The Honest Review

Every sound strategy begins with a review of the present, because a plan built on an imagined starting point will aim at the wrong problems. The review has four parts, and none of them requires special tools — only the willingness to look at your own communication the way a stranger would. Part one is an inventory: list every channel you currently use, every regular message you send, and every place your work is described — website, profiles, printed materials, the words staff say when answering the phone. Part two is a consistency check: read those descriptions side by side and mark every place they disagree about facts, prices, names, dates, or what the work even is. Part three is an audience check: for each channel, who is actually there, in rough numbers and in real comments, messages, and questions — not who you hoped would be there when you opened the account. Part four is an effort check: what does the current communication cost in hours each week, and which parts of it produce replies, bookings, attendance, donations, or questions — and which produce nothing but the doing of them?

Expect the review to be mildly uncomfortable. Almost everyone finds a stale page, a price that changed in one place and not another, an account opened with enthusiasm and abandoned, and a surprising gap between the channel that gets the effort and the channel that gets the results. Treat those findings as the review succeeding, not as anyone failing. You cannot fix what the review was too polite to record. Write the findings plainly, in sentences a colleague could act on: “Our website lists the old Saturday hours; the profile with the most followers is the one we post to least; half of all questions arrive by phone, but nothing we publish answers the three questions callers ask most.” Sentences like those are the strategy’s foundation, because

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each one converts directly into a decision later — fix, feed, close, or answer.

The review also gathers assets, not just problems. You already own things a new organization would envy: real customer words you may quote with permission, photographs of the actual work, a history that can be stated as proof, a list of people who asked to hear from you, relationships with local groups and outlets. List them. A strategy that knows its assets builds messages from true material instead of inventing claims, and schedules from real lists instead of hoping strangers wander by. Finally, the review names constraints honestly: the hours actually available for communication each week, the budget that actually exists (including zero, which is a workable budget when admitted), the skills on hand, and the approvals messages genuinely need. A strategy designed for the team and time you wish you had will collapse by the third week. A strategy designed for the real ones can run for years.

Give the review a fixed, short deadline — a week of spare moments, or two focused sessions — and a fixed length: two pages at most. Then stop reviewing and start deciding. The review's job is to make the strategy's choices informed, not to become a second job of its own. Keep the review document, dated, alongside the strategy it produced. A year later, it will be the evidence of how far the communication has come, and the starting point of the next strategy's own review.

The Steps

1. Inventory every channel, regular message, and description of your work, including what staff say on the phone and in person.
2. Read all descriptions side by side. Mark every factual disagreement — hours, prices, names, dates, services — in a fix list.
3. For each channel, record who is actually there: rough audience size, and the real questions and comments that arrive through it.
4. Track one typical week of communication effort: hours spent per channel, and what each channel produced — replies, bookings, attendance, sales, or nothing measurable.
5. List your assets: permitted customer words, real photos, stated history and proof, your contact lists, and your community relationships.
6. Write your constraints plainly: weekly hours truly available, real budget, skills on hand, and approvals required.
7. Summarize the findings in no more than two pages of plain, actionable sentences, date the review, and file it with the strategy you are about to build.

A Worked Example

Leah is preparing the first real strategy for a small bakery she has run for six years on reputation and a chalkboard. Her review week surprises her three times. The consistency check finds the bakery's wholesale price list — emailed to cafes two years ago and still circulating — quoting prices a full season out of date, which explains a recent awkward negotiation she had blamed on the cafe owner. The audience check finds that her smallest channel, a modest email list of two hundred households built from a paper signup sheet by the register, produces more weekend pre-orders than her social following ten times its size, because the email readers are

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neighbors and the social followers are mostly distant admirers of cake photography. The effort check finds she spends four hours a week photographing and posting for the distant admirers and twenty minutes on the email that pays the rent. Her two-page review states these findings without drama and lists the assets she had never counted: forty permitted customer quotes in a drawer of comment cards, and standing relationships with three cafes and a school. Leah has not written a word of strategy yet, and she already knows its shape: fix the circulating price list this week, feed the email list first, keep social as the shop window rather than the engine, and build messages from the comment cards' real words. That is what a review is for — the strategy, when written, will surprise no one who read it.

Common Mistakes

- **Planning from the imagined present.** Skipping the review means aiming the whole strategy at problems you assume instead of the stale page and misdirected effort you actually have.
- **A review that only lists problems.** Assets — real proof, real lists, real relationships — are half the starting point. A strategy built only on deficits misses the material its best messages will be made from.
- **Designing for wished-for resources.** Hours and budget you do not have cannot run a plan. Honest constraints produce a smaller strategy that survives, instead of a grand one that collapses by week three.
- **Reviewing forever.** The review is a foundation, not the building. Two pages, one week, then decisions. A perfect audit of a strategy that never gets written helps no one.
- **Politeness in the findings.** "Communication could be more aligned" fixes nothing. Name the stale page, the wrong price, the dead channel — plainly, in writing, where the strategy can act on it.

Lesson 2 — Goals Communication Can Actually Move

A strategy's goals decide everything downstream — audiences, messages, channels, effort — so they deserve more care than the usual paragraph of wishes. The discipline is this: a communication goal must name a change in what people know, feel, or do, in a defined audience, by a defined time, measured in a way you can actually check. "Raise awareness" fails that test on every count, which is why it appears in so many strategies and steers none of them. "By the end of the season, half of new bookings come through the email list, up from a quarter today" passes it: audience, change, deadline, measure. Communication goals live between the work's big aims and the individual message. The work's aim might be a full program, a stable business, a safer neighborhood. Communication cannot carry that alone — the work itself must be good, priced right, and actually available — but communication can carry its part: the right people knowing the offer exists, understanding it correctly, trusting it enough to act, and hearing about it in time. Write goals for that part, and only that part, and the strategy becomes judgeable: at the deadline you can say, honestly, whether communication did its job.

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Choose few goals. Two or three communication goals per period — a season, a half-year — is the working range for a small team. More than that and the strategy becomes a wish list in which everything is a priority, which is the same as nothing being one. For each goal, write four supporting lines beneath it. The baseline: where the measure stands today, from your review — a goal without a baseline cannot be judged later. The reason: why this change matters to the work, in one sentence, so a future busy week remembers why this goal outranks a shiny distraction. The owner: one named person responsible for reporting the measure, even if many people contribute. And the review date: when the number will be looked at, which for most goals should be monthly in miniature and fully at the period's end. These four lines are unglamorous, and they are the difference between goals that steer and goals that decorate.

Set the targets with a particular honesty: ambitious enough to require the strategy, modest enough to survive contact with reality. Look at your baseline and your real capacity — the hours from the review — and ask what consistent, well-aimed effort plausibly moves. A list that grows ten percent a quarter through steady, useful messages is a triumph for most small organizations; a plan that requires the audience to triple by spring will quietly teach the team that goals are fiction, and fiction goals poison real ones. Also separate goals from tactics in the writing itself. "Post three times a week" is not a goal; it is an activity, and activities belong in the channel plan, judged by whether the goals move. Teams that mistake activity for goals end up reporting effort — we posted, we sent, we printed — while the audience, unmoved, says nothing back. The strategy's loyalty is to the change in people, and every tactic in it must be able to answer the question: which goal do you serve, and how will we know?

Finally, write what success and shortfall will each trigger. If the goal is met early, what happens — the effort holds steady, moves to the next goal, or deepens? If it falls short at the review date, what is examined first — the message, the channel, the audience assumption, or the offer itself? Deciding this in advance keeps the review honest and calm. Shortfall becomes information with a procedure attached, instead of a verdict on whoever held the pen.

The Steps

1. Write the work's aim for the period in one sentence — what the organization itself needs to achieve — and set it at the top of the goals page as context, not as a communication goal.
2. Draft two or three communication goals, each naming the audience, the change in what they know or do, the deadline, and the measure you will check.
3. Under each goal, write the four supporting lines: baseline from your review, the reason it matters, the named owner of the measure, and the review dates.
4. Test each target against your real capacity from the review — hours, budget, skills. Shrink any target the real team cannot plausibly reach until effort, not luck, could achieve it.
5. Move every activity — posting schedules, print runs, event counts — out of the goals and into the channel plan where it belongs, each tagged with the goal it serves.
6. Write, for each goal, what meeting it early will trigger and what falling short will trigger examining first.

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7. Read the goals aloud to the team. If anyone cannot say which goal their weekly communication work serves, the goals are not yet clear enough — rewrite until they can.

A Worked Example

A community legal-advice clinic — staffed by volunteers, open two evenings a week — writes its first strategy. Its work aim for the half-year: reduce the number of people turned away because the clinic was full, by filling seats evenly instead of in a panic on one famous evening. The review showed the real problem: nearly all arrivals came on Tuesdays, driven by one old listing, while Thursdays sat half-empty, and many arrivals brought problems the clinic does not handle, having never seen a clear statement of what it covers. The clinic sets two communication goals. Goal One: by the end of the half-year, Thursday attendance reaches at least eighty percent of Tuesday's, measured by the sign-in sheet, by making Thursday as visible and as clearly described as Tuesday in every channel. Baseline: Thursday at forty-five percent. Owner: the clinic coordinator. Goal Two: halve the number of arrivals whose problems fall outside the clinic's stated scope, measured by the intake tally, by publishing a plain "what we can and cannot help with" statement everywhere the hours appear. Baseline: eleven out-of-scope arrivals a month. Notice what the goals do not say: nothing about posting frequency, nothing about awareness. Every tactic the clinic later chooses — correcting the old listing, printing the scope statement for the library noticeboard, asking partner churches to announce Thursdays — must declare which goal it serves. At the half-year review, Thursday stands at seventy-six percent and out-of-scope arrivals are down by a third: not perfection, and not fiction either — two honest numbers that tell the clinic exactly what its next strategy should push on.

Common Mistakes

- **"Raise awareness" as a goal.** Awareness of what, among whom, by when, measured how? A goal that cannot be judged cannot steer, and unsteerable strategies drift into whatever is easiest to post.
- **A dozen goals.** When everything is a priority, busy weeks choose by accident. Two or three goals, honestly resourced, beat ten that share one tired team.
- **Activities dressed as goals.** "Post more" measures effort, not change. Keep tactics in the channel plan and judge them by whether the audience actually moved.
- **No baseline.** Without today's number written down, the review date arrives with no way to know whether anything changed. The baseline is one honest figure from the review — record it.
- **Targets set by hope.** Goals that require luck teach the team to ignore goals. Set targets that steady, well-aimed effort can reach, then let success raise the next period's ambition.

Lesson 3 — Know Your Audiences: Simple Research That Works

Goals name audiences; this lesson makes those audiences real. Audience research sounds like something requiring surveys, software, and a budget. For a small organization, the most valuable research is simpler and closer: listen carefully to the people already talking to you, ask a few of them direct questions, and write down what you learn where the strategy can use it.

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Start with the records you already own. Read the last few months of questions — calls, emails, messages, comments — and tally what people actually ask, in their actual words. Read your reviews and comment cards. Note the misunderstandings that repeat: the thing people consistently think you do that you do not, the step they consistently stumble on, the word of yours they consistently misread. Those repetitions are research gold. They tell you what your messages must answer, correct, and make unmissable — and they cost nothing but an afternoon and a tally sheet.

Then ask, directly and briefly. Five to ten short conversations teach more than a hundred guessed personas. Choose people from each main audience — a loyal customer, a new one, one who asked and never bought, a partner, a front-line staff member who hears the public daily — and ask the same handful of questions. How did you first hear of us? What nearly stopped you from coming, buying, or joining? What do you wish we explained better? Where do you actually see our messages — and where do you never see them? What would you tell a friend we are? Record the answers in their words, not your summary of their words, because their phrasing is the raw material of messages that will sound true to people like them. Ask permission before quoting anyone anywhere, and keep private anything shared in confidence; research that betrays trust to build messages about trust defeats itself in one move.

Turn what you learn into audience profiles the strategy can use — one short profile per main audience, half a page each, in a fixed shape. Who they are. What they need from the work. What they already believe, rightly or wrongly. Their main barrier — the cost, doubt, confusion, or inconvenience that stands between them and acting. The words they use for the thing you offer. Where they pay attention. And the one thing your communication must never do to them — bury the price, announce their news publicly first, use the jargon they told you they hate. Three to five audiences is the working range, for the same reason as goals: profiles beyond that stop being read. Resist inventing colorful fictional personas with stock-photo names and hobbies; a profile built from your real listeners' real sentences will outperform a prettier invention every time, because every line of it can be traced to evidence.

Keep the research alive after the strategy launches. The tally of questions continues monthly — it takes minutes when it is a habit — and any question asked three times earns a place in your messages, your profiles, or your published answers. Once or twice a year, repeat the short conversations and update the profiles, striking what has changed. Audiences move: a new housing development, a closed competitor, a change in who can afford what. A strategy whose profiles are dated and refreshed stays aimed. A strategy whose profiles were written once, from guesses, in the founding January, is aiming at people who may no longer exist.

The Steps

1. Gather the last few months of real questions and comments from every channel. Tally the repeats: most-asked questions, recurring misunderstandings, common stumbling points.
2. Choose five to ten people across your main audiences and hold short conversations using the same core questions: how they found you, what nearly stopped them, what to explain better, where they see you, what they would tell a friend.

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3. Record answers in the speakers' own words. Ask permission before any quote is used anywhere, and keep confidences out of the strategy entirely.

4. Write one half-page profile per main audience in the fixed shape: who they are, what they need, what they believe, their main barrier, their own words for your offer, where they pay attention, and what your communication must never do to them.

5. Limit the strategy to three to five profiles. Merge audiences whose needs, barriers, and channels are genuinely the same.

6. File the question tally as a living document. Review it monthly; any question asked three times earns a message, a profile update, or a published answer.

7. Date the profiles and schedule their refresh — short conversations repeated once or twice a year, and immediately after any major change in your work or community.

A Worked Example

Samira runs a small driving school and assumes her audience is teenagers and her message should be about passing the test. Her research afternoon disagrees. The question tally shows the most common caller is not a teenager but a parent, and the most common question is not price — it is whether the instructor will collect the student from school, and who exactly will be in the car. The conversations deepen it. Two parents say the phrase that decided them was a neighbor's sentence: "She texts you when they set off and when they're back." A lapsed enquirer, asked kindly what stopped her, says the website never stated whether lessons could be in an automatic car, and she did not want to phone and "sound stupid" — so she booked elsewhere. Samira's profiles change shape. Audience One is now parents of learners, whose barrier is not cost but reassurance, whose own words are "set off and back safe," and whose channel is the school-gate conversation and the local parents' group, not the platform Samira had been feeding. Audience Two is adult learners returning after years away, whose barrier is embarrassment and whose profile carries the instruction: never make them phone to learn basics the website should state. The strategy that follows writes itself differently — the collection-and-texting practice becomes a headline message with proof, the automatic-car question is answered on the first page, and "sound stupid" becomes Samira's permanent test for every draft: could a nervous person learn this without having to ask? Her bookings do not change because she researched. They change because the strategy built on the research finally addressed the people who were actually deciding.

Common Mistakes

• **Skipping research because you "know your customers."** Familiarity hides exactly what research reveals: the question answered daily and never published, the barrier nobody mentions to your face. The tally and the conversations take an afternoon. Guesswork costs a season.

• **Invented personas instead of real listeners.** A fictional character with a stock name cannot correct your message. Profiles traced to real sentences can — every line is checkable against evidence.

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- **Summarizing away people's words.** Their phrasing is the asset. "Set off and back safe" persuades parents in a way your polished paraphrase will not. Record verbatim; quote only with permission.
- **Researching once, at the start.** Audiences change as neighborhoods, prices, and competitors change. Dated profiles and a monthly question tally keep the strategy aimed at people who still exist.
- **Too many audiences.** Seven profiles means none get served well. Three to five, honestly merged, is the range a small team can actually write for.

Lesson 4 — Messages, Proof, and Stories: The Substance of the Strategy

With goals set and audiences known, the strategy needs its substance: the key messages everything else will carry. A key message is a true, important sentence your audience should be able to repeat after encountering your communication — not a slogan for its own sake, but the distilled answer to "what should these people understand, and why should they believe it?" Most strategies need three to five key messages in total, arranged with care. Usually one states the offer plainly: what the work is and who it serves. One carries the difference: what is distinct about how you do it, stated as fact rather than superiority. One carries the practical truth: cost, limits, eligibility, how to start — the message organizations most often omit and audiences most often need. And one carries the invitation: the specific next step, small and clear, that a persuaded listener can take today. Write each message in the audience's words from your research, at the length of a breath or two, and test each one against a hard standard: could a listener repeat it accurately to a friend tomorrow? Messages that cannot survive retelling will not survive the market either.

Under every key message, the strategy files its proof — because a message without proof is a claim, and audiences have been trained by long experience to discount claims. Proof comes in kinds, and a strong strategy uses several. Numbers you can stand behind: years, counts, rates, each with its date and source noted so it can be updated honestly. Process proof: the visible way the work is done — the checklist, the second pair of eyes, the text when the student sets off — which persuades because it can be pictured. People proof: permitted quotes and named stories, the strongest kind and the kind requiring the most care. And credential proof: qualifications and memberships stated exactly, neither padded nor vague. For each key message, list two or three proofs and where they live — the page, the photo, the document — so any team member drafting a message can reach the evidence in minutes. Where a desired message has no proof, the strategy has found a gap, and the honest options are the only options: gather the proof over time, shrink the message to what today's proof carries, or drop the message. A strategy that writes the claim anyway has chosen decoration over trust, and the audience will eventually grade that choice.

Stories deserve their own small system inside the strategy: a story bank. A story bank is a growing file of short, true accounts of the work — a problem, what was done, what changed — each recorded with the teller's permission, the details checked, and a note of which key

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message it proves. Three or four sentences each is enough; the bank's value is readiness. When a message needs illustrating — in a post, a talk, a funding letter, a reply to a hard question — the drafter reaches into the bank instead of inventing an example under deadline pressure, which is when details get improved and permissions get forgotten. Feed the bank deliberately: after a piece of work goes well, ask at the natural moment whether the story may be kept and shared, and write it down the same week while the facts are fresh. Review the bank when you review the strategy, retire stories whose facts have aged out, and never let a story outgrow what its teller agreed to. Handled this way, stories become the strategy's memory — the place where the proof lives in human form — and audiences, who forget claims and remember stories, will carry your key messages further in their own words than any channel you own.

Tone belongs in this lesson too, briefly, because messages are where tone is decided. The strategy states, in a few lines, how the work sounds: three words for the voice, the plain-language rule, and anything the work never says — hype it cannot prove, jargon the research showed audiences dislike, promises the work does not keep. Those few lines, written once, settle a hundred future drafting arguments, and they ensure that the messages sound like one speaker across every channel and every writer.

The Steps

1. Draft three to five key messages covering the offer, the difference, the practical truth (cost, limits, how to start), and the invitation — each in your audiences' own words, each short enough to be repeated accurately by a listener.
2. Test each message: read it once to someone in the audience and ask them to say it back. Rewrite any message that does not survive retelling.
3. Under each message, file two or three proofs — numbers with dates and sources, visible process, permitted quotes, exact credentials — with a note of where each proof lives.
4. Where a message lacks proof, choose honestly: gather proof over time, shrink the message to what the proof carries, or drop the message. Never file the claim alone.
5. Start the story bank: a file of short, true stories, each with permission recorded, facts checked, and the key message it proves noted. Add to it the same week good work happens.
6. Write the tone lines into the strategy: three voice words, the plain-language rule, and the never-say list drawn from your research and your limits.
7. Review messages, proof, and the story bank at every strategy review. Retire stale proof, update numbers with their new dates, and refresh stories whose facts have aged.

A Worked Example

A small home-repair nonprofit, run by Walter, fixes essential repairs for older homeowners who cannot afford market rates. Its old message was "we help seniors stay in their homes," which is kind, true, and impossible to repeat with any grip — it says nothing about what happens, for whom exactly, or how anyone starts. The strategy work produces four key messages. The offer: "Free essential repairs — heating, plumbing, leaks, locks, and steps — for homeowners over

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sixty-five in our county.” The difference: “Every job is visited first by Walter or his deputy, and the homeowner gets the plan and the date in writing before any work begins.” The practical truth: “We cannot do roofs, full rewiring, or work on rented homes, and there is a waiting list — currently about six weeks — which we will tell you honestly when you call.” The invitation: “Call the office number any weekday morning; if we cannot help, we keep a list of who might, and we will say so on that call.” The proofs are filed beneath: job counts by year from the work log, the written-plan habit photographed with permission, the waiting-list figure updated monthly by the office volunteer, and the referral list itself, printed and dated. The story bank holds, among others, the account of a widow whose heating failed in January — visited Tuesday, plan in writing Wednesday, heat restored Friday — told with her permission and in her words where it counts: “They wrote it down. Nobody writes it down.” Walter’s team finds the practical-truth message the hardest to publish and the most valuable once published: calls become shorter and kinder, ineligible callers leave with a referral instead of a dead end, and the waiting-list honesty, repeated by callers to neighbors, becomes the reason new callers give for trusting the service before it has touched their homes.

Common Mistakes

- **Key messages that are really slogans.** A slogan aims to be catchy; a key message aims to be repeated accurately and believed. If a listener cannot say it back with its meaning intact, it is not finished.
- **Omitting the practical message.** Cost, limits, and the waiting list feel unglamorous, so strategies hide them — and audiences, discovering them late, read the hiding as the organization’s character. The practical message builds the trust the others spend.
- **Claims filed without proof.** “Dedicated,” “leading,” “trusted” — unproofed adjectives teach audiences to discount everything else on the page. Proof beneath every message, or a smaller message.
- **Stories improved in the telling.** A detail polished here, a timeline tightened there, and the story bank becomes fiction with real names in it. Check facts, keep permissions, and let true stories be exactly as strong as they are.
- **A story bank left to memory.** Unrecorded stories evaporate or mutate. Written the same week, with permission noted, they become the most reusable asset the strategy owns.

Lesson 5 — Channels, Rhythm, Measurement, and the Document Itself

The final stage turns substance into a running plan, and then into the short document that is the strategy. Channels first, chosen by evidence rather than habit: for each audience profile, the strategy names the one or two channels where that audience demonstrably pays attention — from your review and research, not from general fashion — and states what each channel is for. One channel may carry full detail and serve as the record; others point to it. Channels you cannot keep current are closed or formally paused, with a final post or notice saying where to find you instead, because an abandoned channel is a message too, and it says the work may

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have stopped. For each kept channel, the plan sets a realistic rhythm: the frequency your real hours from the review can sustain on your worst month, not your best. A modest rhythm kept for a year builds more recognition than an ambitious one that collapses by spring and teaches the audience to stop expecting you. Every recurring item names its owner and its source material — which key message, which proof, which story — so drafting starts from the strategy instead of from a blank screen and a deadline.

Measurement is built into the plan now, not bolted on later, and it stays deliberately plain. For each goal from Lesson 2, the strategy names the measure, where it is counted, who counts it, and when it is looked at. Around the goals sit a few channel health numbers worth glancing at monthly — replies and questions received, the tally of repeated questions from Lesson 3, which messages drew action rather than applause — kept on one page, in one sitting of under an hour a month. The monthly look has a fixed agenda of three questions. Are the goals moving, at the pace the strategy expected? What did audiences actually respond to, ask, or misunderstand — in their behavior, not our hopes? And what one or two adjustments follow, written into the plan with a date? Resist measuring everything; a page of forty numbers reviewed by nobody is worse than six numbers reviewed monthly by the owner, because the point of measurement is not reporting — it is steering. When a measure flatlines for two reviews running, the strategy says what gets examined first: the message, the channel, the audience assumption, or the offer itself, in that order, changing one thing at a time so the next review can tell you what the change did.

Then write the document. A complete small-organization strategy fits in roughly six to ten pages, in the order this lesson set built it: starting point summary, goals with baselines and owners, audience profiles, key messages with proof, tone lines, channel plan with rhythms and owners, measurement page, and the review schedule. Write it in the plain language it preaches, with names and dates filled in — a strategy full of brackets and placeholders is a draft, and drafts do not steer. Circulate it to everyone who speaks for the work, walk them through it once in person, and file the review and research beneath it as appendices they can check. Put the review dates in the calendar the day the strategy is adopted: a monthly one-hour look, and a fuller revision each period — a season or half-year — at which goals are re-set, profiles refreshed, messages re-proofed, and channels re-chosen by the new evidence. Revision is not an admission that the strategy failed; it is the strategy working as designed, because a strategy that cannot be revised by evidence will be revised by drift instead, silently and badly.

Adopt the strategy with one last discipline: from adoption day, every public message gets a ten-second trace before it goes out — which goal does this serve, which audience is it for, which key message does it carry, and is its proof still true? Messages that pass the trace go out with confidence. Messages that fail it are not necessarily bad messages; they are unplanned ones, and the trace forces the honest choice — fit them to the strategy, or consciously amend the strategy if the work has genuinely changed. That ten-second habit, repeated, is what makes a strategy a living instrument instead of a document from the month it was written. A year of it produces the thing audiences call, without knowing its name, a clear voice: the same true things, said steadily, in the places people actually listen, by an organization that visibly learns. Build that, and the strategy has done everything a strategy honestly can.

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The Steps

1. For each audience profile, choose the one or two channels the evidence says they use. State each channel’s job, name the channel that carries full detail, and close or formally pause any channel you cannot keep current.

2. Set each channel’s rhythm from your real worst-month capacity, and assign every recurring item a named owner and its source key message, proof, or story.

3. Write the measurement page: for each goal, the measure, where it is counted, who counts it, and when it is reviewed — plus the monthly question tally and the few channel health numbers you will actually look at.

4. Fix the monthly review: one hour, three questions — are goals moving, what did audiences actually do and ask, what one or two adjustments follow — with adjustments written into the plan and dated.

5. Assemble the strategy document in order: starting point, goals, profiles, key messages with proof, tone lines, channel plan, measurement, review schedule. Fill in every name and date; leave no placeholders.

6. Walk the whole team through the adopted strategy once, in person, and file the review and research beneath it as checkable appendices.

7. Put the monthly reviews and the end-of-period full revision in the calendar today, and adopt the ten-second trace for every public message from now on: goal, audience, key message, proof still true.

A Worked Example

Priya inherits communications for a small language school — adult evening classes, three teachers, no staff whose job title mentions marketing. The strategy she builds over a month of spare hours is eight pages. Channels by evidence: the school’s email list of past and present students, which the review showed produced most re-enrollments; a single social account kept as the public window, posted to twice a week at a rhythm the worst month can hold; and printed cards in the two libraries and the community center, because the research conversations kept naming them as where adult learners in this town actually look. The old second social account is closed with a polite final post. Rhythm: one email a month, owned by Priya, sourced each time from a key message plus a story from the bank; library cards reprinted each term with the term’s dates checked against the source page. Measurement fits on half a page: Goal One’s measure — the share of new enrollments who name email or a library card as how they heard — counted from a single question added to the enrollment form, tallied by the evening receptionist; Goal Two’s measure — returning-student rate — from the register. The first monthly review is almost dull, and that is its triumph: numbers present, one repeated question identified (“do you offer a class for complete beginners?” asked nine times, though the answer was buried on the website’s third page), one adjustment made — the answer moves to the first page and into the next email — and the strategy gains a dated amendment instead of a quiet drift. At the half-year revision, enrollments sourced from email and cards have risen, the returning rate is up modestly, and Priya’s successor — for she is handing over — receives not a password and a shrug, but

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eight pages that explain what the school says, to whom, where, and how anyone can tell whether it is working. That handover, more than any single campaign, is what creating a communications strategy is for.

Common Mistakes

- **Channels chosen by fashion.** Being everywhere your audience is not, in formats your hours cannot sustain, produces five stale storefronts. Evidence from your own review and research chooses channels; fashion does not know your town.
- **A rhythm set for your best month.** Plans built on peak energy collapse at the first busy season, and the silence afterward costs more than a modest rhythm ever would. Plan for the worst month you must survive.
- **Measuring everything, reviewing nothing.** Forty numbers nobody reads steer nothing. Six numbers, one hour, three questions, every month — measurement exists to change decisions, not to decorate reports.
- **Changing everything at once when numbers stall.** If message, channel, and offer all change together, no review can say what worked. Examine in order, change one thing, and let the next review grade it.
- **A strategy written once and shelved.** Placeholders left blank, review dates never calendared, amendments made by drift — a shelved strategy is a historical document. The ten-second trace and the dated reviews are what keep it alive.

Try It

Create your strategy over the next two weeks, in the order of these lessons, giving each stage one focused session. Session one: complete the honest review — inventory, consistency check, audience and effort checks, assets and constraints — in no more than two pages. Session two: write two or three communication goals, each with its baseline, reason, owner, and review dates, and move every activity out of the goals and into a tactics list. Session three: do the research — tally the last few months of questions, hold five to ten short conversations, and write three to five audience profiles in their real words. Session four: draft your key messages, test each by having someone say it back, file the proof beneath each one, start the story bank with three true stories recorded with permission, and write your tone lines. Session five: choose channels by evidence, set worst-month rhythms with named owners, write the measurement page, assemble the full document with every name and date filled in, and put the monthly review and the period-end revision in the calendar before you close the file. Then adopt the ten-second trace for your very next public message. Your first strategy will not be perfect, and it does not need to be — it needs to be written, honest, and reviewed. Perfection arrives, if it arrives, through the revisions.

Fortress shares what I learned, not professional advice. General info only, not legal / HR / financial advice.

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