



Campaign Strategy Planning

a guide for to conceive a campaign





Name of
your
campaign

Campaign
description:
Describe your campaign in a
100 words or less

1. Goal

The over-arching vision or big picture change that winning your campaign will contribute to

2. Issue

An issue is part of the problem and part of the solution.

3 useful criteria to select an issue are:

(1) does it have flow on impact; (2) is it broadly and deeply-felt; and (3) is it winnable?

3. Objective

Write your objective in a SMART format:

Specific and strategic in the sense that it supports your campaign objective;

Measurable,

Achievable (doable);

Realistic (within your group/organisations capacity);

and, Timebound.

4.

**Decision-
maker/Primary
target**

The institution, person (or sometimes people) who can give you what you want.

5.

**Secondary
target/s**

Person or people or who can influence the primary decision-maker.

6.

**Theory of
Change
Statement**

*If we do [activities/approach]
then [change/outcome will
occur]*

because [reason/logic].

7.

Forcefield Analysis

What are the forces for and against your campaign objective? A forcefield analysis helps to think about forces affecting the movement. Forces can include political, economic and cultural factors. It can help us decide where to focus our energy during the campaign, and to anticipate obstacles.

Forces AGAINST change	Forces FOR change
make it hard to achieve your objective	make it more likely to achieve your objective

8.

Sources of Power and Pillars of Support

This is useful if you are facing a very powerful decision-maker who is part of the government and you need to organise and mobilise people power to influence their decisions. Which key social groups and institutions supply what sources of power (political and legal legitimacy, human resources/workers, particular skills and knowledge, money and infrastructure, beliefs, fear of sanctions/security forces). Identify the key pillars you will focus on shifting/undermining/or 'neutralising and the social groups you want to pull over to your side.

9. Power Map

Identify campaign influencers, allies and other stakeholders and the relationships between them.

10.

Critical Path

A critical path identifies one or more pathways to achieve broader goals or discreet campaign objectives. The more concrete and achievable the objectives are, the easier it is to develop a critical path that can then serve to guide. Think of each step on your critical path as smaller changes. Revisit your critical path regularly.

11.

Organising Statement

I/We are organising (who) to do what what (our campaign goal or a smaller change/outcome in our critical path) by when and how (tactics and timeframe)

12.

Tactics

Tactics are the social action activities that you use to achieve your goals and objectives. Your strategy is the sequencing of these in a logical and high impact way. List and describe the tactics required to achieve each campaign objective. Decide which tactics will deliver the greatest impact. Think about what tactics are needed to achieve each of the smaller changes that are part of your critical path. Revisit these regularly

13.

Tactics criteria

Develop and agree on a set of criteria to assess potential. These criteria were adapted from a set developed by the Midwest Academy:

Can you really do it? Do you have the needed people, time and resources?

Do your tactics escalate over time? Is it within the experience of your own members and are they comfortable with it?

Can lots of people participate in it? Is it focused on either the primary or secondary target?

Does it meet your organisational objectives as well as your campaign objectives? Do you have enough leaders experienced enough to do it?

Will it play positively in the media? Does it put real power behind a specific demand?

Is it outside the experience of the target? Will people enjoy participating in it? Does it reflect/embody your values and vision?

What criteria will you use to assess and prioritise tactics?

14.

Communication strategy: key messages

Key message	What are the killer facts (ideally backed up by a reputable source) which support your message (three maximum)
1. (for example) If we enact this blueprint today, Vietnam will need to construct no new coal-fired power stations	1. 2. 3.
2. (for example) Switching to clean energy will save lives and money in Vietnam	1. Coal is a primary cause of air pollution. The WHO states that air pollution kills ** people a year in Vietnam 2. According to Bloomberg, the cost of renewable energy has dropped by &&% in the past 5 years. 3.
3.	1.

15.

Circles of Commitment

How are you building participation in your campaign?

Who is in each circle?

What do they do? What is going well with this current allocation of tasks?

Is there anything you feel needs to be done differently that would improve the effectiveness of the campaign?

Think about your 'core' for a moment.

Are there tasks currently being undertaken by the core that could be done by people who are committed?

What about the people in the other circles?

How might they be encouraged and supported to be more involved?

Do your timeline

A good and detailed timeline is crucial for a good campaign.

Campaign timeline

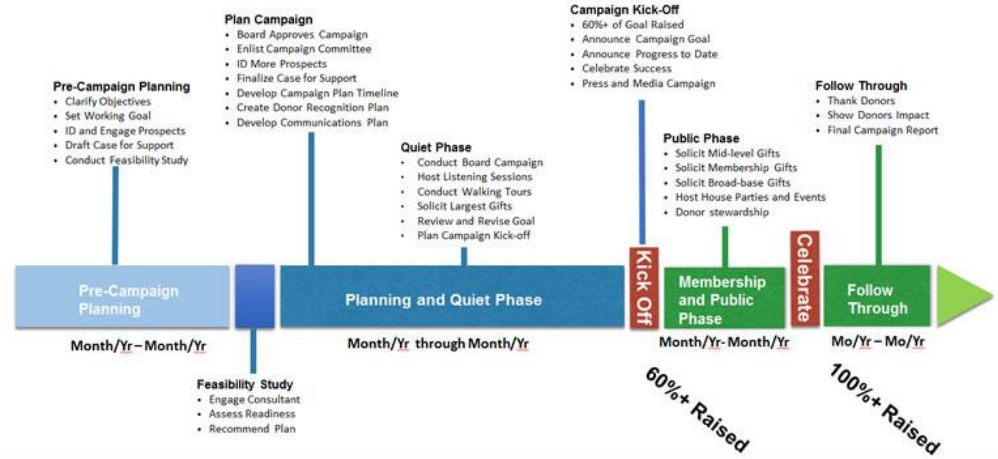
Download the whole thing!
<https://crmrkt.com/y1o9W>

Beautiful Red Blankets Campaign Timeline

	January	February	March	April	May	June
Campaign strategy development	█					
Creative briefing		█				
Concept refinement			█			
Copy refinement			█			
Asset build					█	
Sign off and proof reading						█

YOUR LOGO HERE

Campaign Timeline and Flow



ccm

capitalcampaignmasters.com

Evaluations are important



Milestones are essentials. Milestones are a way of knowing how the project campaign is advancing, especially the tasks being executed. They symbolize an achievement, or a point of time and offer the possibility to correct what's preview, if need, to mobilise more or less resources, to identify risks, etc.



Campaign planning process

A. Research

Identify your vote → Get to polls

1. Poll-by-poll analysis
2. Socio-demographics
3. Local issues
4. Opposition

Goals: short-term, medium-term, long-term

Focus-criteria (ex.):

1. Real improvement
2. Widely & deeply felt
3. Winnable
4. Easy to understand
5. Has clear timeframe
6. Can raise money

Parties or independent? Parties can be very helpful, but do the research. Also, localize the message.

Fill in: responsive snapshot, be careful

Message: clear, concise, compelling, contrasting

TEST: before campaign, repeat constantly in accessible ways

Communications: paid, earned, story, activities, timelines, resources

B. Voter Contact

Targeting: which? how? how often?

Base-building: Voter identification

Canvassing (foot/phone): most reliable

Objectives:

1. Identify target voters
2. Persuade target voters
3. Get out the vote

Different voter contact methods:

- Signs
- Local media (1-2 weeks)
- Paid media? Know rules, be strategic
- Voice broadcast: candidate or recognizable, be careful about freq
- Web, social media (permanent record too)
- Condo canvassing? elections ad, volunteers inside, activities room

Tactics: Use a wide range, See possibilities, Train & engage people → build relationships

C. Budget & Fundraising

plan → budget (high, medium, low) → fundraising plan

Limit is small, varies by place, rules about excess

20% admin, 70-80% voter contact, ~10% research

D. Organizing volunteers

write basic job descriptions, Fill key positions as soon as you can

E. Scheduling

work backwards → election day

1. How will the candidate's time be prioritized? Who decides?
2. How will materials be rolled out?

Campaign Plan

1. Pre-election research and analysis
2. Campaign goal: # of votes
3. Analyze & target voters
4. Develop message
5. Develop plans: voter contact, communications, budget & fundraising...

2. Favourite tool for getting out the vote?
3. Consistent canvassing, pre-work. It's tough, but still the best.
4. Choosing your management team?
5. Expertise + experience → campaign manager needs to help keep candidate focused. 12-14 hours/day?
6. Do people vote for candidates or party leaders?
7. Maybe both, depends on the situation

RULES

add/customize your own rules too!

1. Write! goal, how to get there, not just a calendar, Prepare months (even years!) before, Be involved year-round, Share, consultants may not be as useful as local volunteers
2. Value
3. Know your win number (e.g. 2000 RRR votes)
4. Anticipate Murphy's Law: Things will go wrong, Budget from election day backwards - don't run out of money
5. Be flexible, but measure it against your previous strategy
6. Play by the rules, sign laws, blackout periods, look them up, don't assume, work on your plan w/ others, Don't just shelve your plan

Evaluations are important!

What went well?
What would you do differently?
Write your plan down so you can evaluate it

A white banner with red text hanging against a dark background. The banner is held up by four yellow ropes at the corners. The text is written in a bold, sans-serif font.

**We don't build hope,
we build futures.**

Thanks for your attention

UG