NationalJournal COMMUNICATIONS COUNCIL

Storytelling Strategies for Purpose, Promotion, and Advocacy

COMPANION IMPLEMENTATION TOOLKIT

Strategic Storytelling for Purpose, Promotion, and Advocacy

Companion Implementation Toolkit

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About This Workbook

If there's one thing we learned throughout the process of researching storytelling among Washington nonprofits, it's this: there's a lot of talk of *why* stories are important, and why we should be telling them—but very little talk of *how* to do it. Consider this set of tools, worksheets and resources—a companion to our seven-month study of effective storytelling approaches—your fully customizable treatise on the "how" of storytelling.

Throughout its pages, you'll find step-by-step guidance on everything from influencing the culture of storytelling within your organization, to translating your organization's mission and values into concrete, character-driven narratives, to sourcing stories more effectively from members and advocates, to sharing stories more creatively and effectively on digital channels and measuring their success. The tools are meant to be interactive, prompting you with questions and other thought-starters. Use them in team meetings, print them out and pin them to your bulletin board, pass them along to colleagues or members. In the process, we hope that all types of storytellers, from beginners to more advanced practitioners, are inspired to tell more compelling, effective stories of their issues or industries.

All of the examples and tips within come from research interviews conducted with more than 50 organizations and experts working in the policy communications field, in addition to an extensive audit of more than 200 organizations' current storytelling practices. For more information on the companion study, visit nationaljournal.com. We welcome your feedback—as well as your own stories of how you're using these tools!

- Research Team, National Journal Communications Council

Chapter One: Getting Started

Objectives:

- To assess the organization's willingness and ability to tell stories
- To identify and address internal storytelling roadblocks
- To align the organization around shared priorities and systems

Tools:

#1: Story Management Model Selection
Worksheet to help organization understand the appropriate model for managing storytelling internally

#2: Resource Selection Guide
Guide to help organization understand when and how to seek external partnerships vs. using in-house talent and time for developing stories

#3: Story Bank Selection Criteria
Guide to help organization determine method for collecting and cataloguing story assets for easier access and collaboration

#4: Culture Change Toolkit
Methodology and framework to equip communications team to be internal storytelling ambassadors

#1:
Story Management Model Selection

Overview

Within most organizations, effective storytelling requires inputs from multiple departments or functions. The communications team, the membership, program or research teams, and the government affairs and policy teams all have important roles to play in the processes of collecting, creating and sharing stories. But managing these processes among traditionally siloed functions can be a challenge. Successful organizations employ models that maximize the strategic inputs of necessary parties, while assigning ownership and allocating resources efficiently.

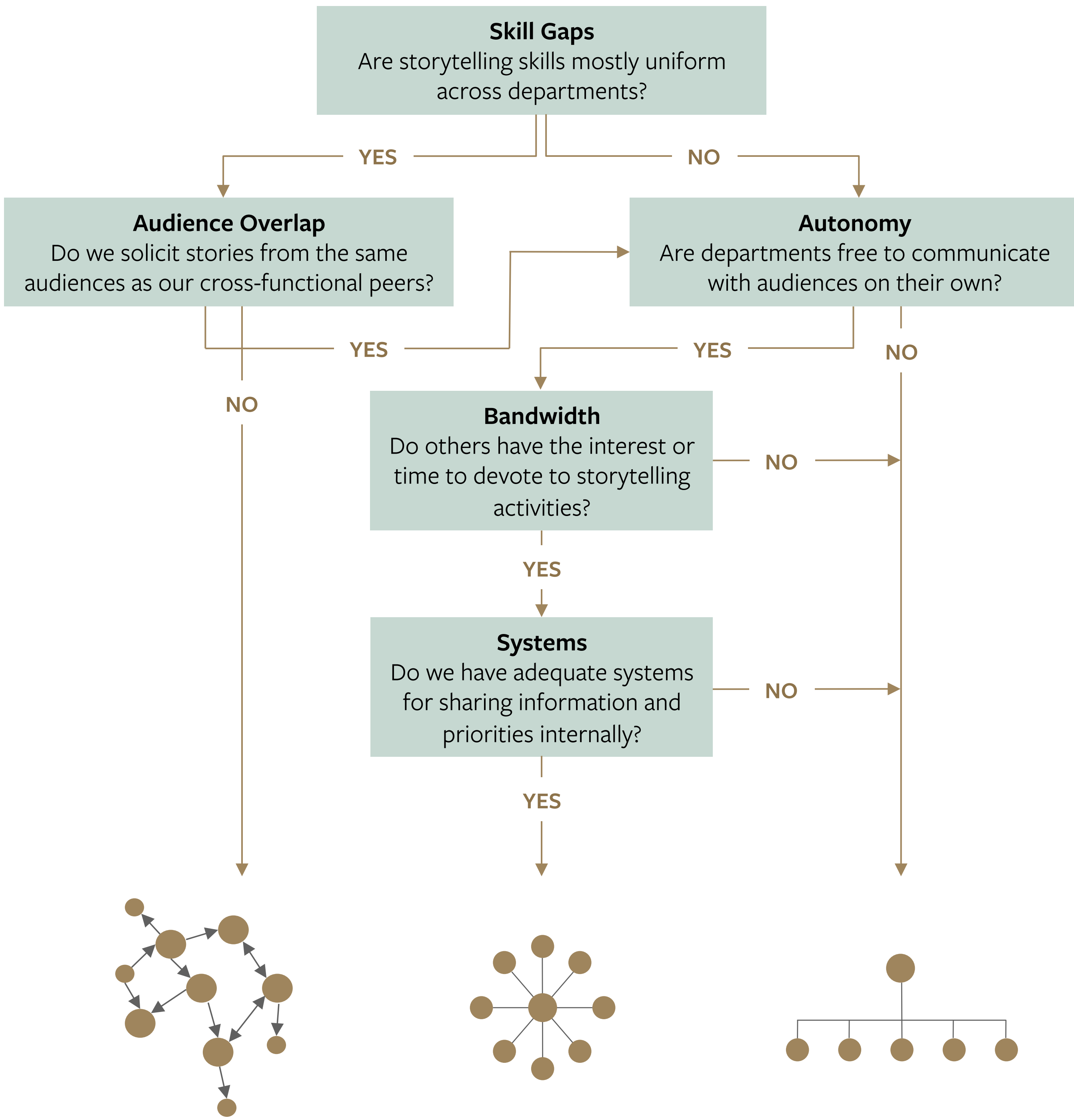
Outcomes

- A set of key considerations and questions to drive model selection
- Guide to structuring a conversation that elicits the strategic story inputs of each organizational unit or function

Estimated Completion Time: 25 minutes

Asking the Right Questions

The following decision tree highlights key questions about current organizational structure and communications efforts that will allow you to identify the most appropriate model for managing storytelling efforts.



Decentralized

No single department owns storytelling; efforts are ad hoc and scattered across the organization

Hub and Spoke

Cross-functional team sits in a centralized position and helps other units meet their needs

Centralized

One department manages all storytelling-related activities and acts as the clearinghouse for all needs

Planning for Productive Conversations

Prior to beginning any formal structuring (or restructuring) of storytelling efforts, it's helpful to have conversations with each department or function to determine the assets they potentially bring to the table, as well as any limitations or concerns they have about participating in the process. The following worksheet can help guide those conversations.

Instructions: Invite participant(s) from each function to fill in their respective sections, and use the talking points generated as a form of discovery or exploration prior to assigning more structured roles or responsibilities.

Sample Assets	Sample Limitations
✓ *Access to key stakeholders*	✓ *Confidence, skills*
✓ *Relationships*	✓ *Clarity of role, purpose*
✓ *Knowledge of issues or needs*	✓ *Bandwidth*
✓ *Skills*	✓ *Access to information*
✓ *Objectivity*	✓ *Competing priorities*

Communications Team

ASSETS *What are our key contributions? What resources do we own as a team that can be applied?*	LIMITATIONS *What barriers stand in the way of us participating in a productive way? What are we afraid of?*

Government Affairs / Policy Team

ASSETS *What are our key contributions? What resources do we own as a team that can be applied?*	LIMITATIONS *What barriers stand in the way of us participating in a productive way? What are we afraid of?*

Planning for Productive Conversations (cont'd)

Membership / Program Team

ASSETS *What are our key contributions? What resources do we own as a team that can be applied?*	LIMITATIONS *What barriers stand in the way of us participating in a productive way? What are we afraid of?*

Research Team

ASSETS *What are our key contributions? What resources do we own as a team that can be applied?*	LIMITATIONS *What barriers stand in the way of us participating in a productive way? What are we afraid of?*

Other Team: ______________________________

ASSETS *What are our key contributions? What resources do we own as a team that can be applied?*	LIMITATIONS *What barriers stand in the way of us participating in a productive way? What are we afraid of?*

#2: Resource Selection Guide

Overview

When it comes to storytelling, organizations have similar reasons for turning to outside agencies: they have a gap in specific skills and a need for a commercial-quality product, or they have a small staff that's strapped for time. But, are these the factors that should determine whether an organization hires an outside firm? Use this worksheet to determine whether your team has the skillsets to tell stories, and if not, what type of projects you can outsource based on your budget and resources.

Outcomes

- Assessment of current strengths and weaknesses of storytelling team
- Tailored strategies for conducting in-house storytelling and supplementing with outside consultants

Estimated Completion Time: 10 – 15 minutes

Preparedness Assessment

Instructions: Read the statements below and rate the accuracy of each as it relates to your organization. Tally up the totals for each sub-section (e.g., Campaign History, Skillsets); then, add these together to get the section total (e.g., Experience, Resources).

2 pts = True *1 pts = Neutral* *0 pts = False*

Standard of Quality	Rating
EXPERIENCE	/18
Campaign History	/6
▪ We actively solicit stories from our members, advocates and the public.	
▪ We have an in-house story bank or a staffer in charge of managing story collection.	
▪ In the last year, we have created and released a story that made an emotional connection with audiences, as evidenced by qualitative feedback or other metrics.	
Skillsets	/8
▪ Our team can distinguish between a weak story and a strong one.	
▪ Other teams' staff are trained to recognize a story and share it.	
▪ We have formed a communications strategy based on analytics and research.	
▪ We have more than one team member who is well-versed in or an active user of at least one of the following: social media, blogging, photography, videography, design, or audio.	
Willingness/Interest	/4
▪ Staff have expressed interest in experimenting with storytelling techniques.	
▪ Leadership believes storytelling should be part of our communications strategy.	
RESOURCES	/16
Tools	/6
▪ We have access to professional audio or video equipment and software, such as a DSLR camera, a recording studio, and Photoshop, Pro Tools, or Audition.	
▪ We have access to smartphones or other less-professional equipment and software, such as a point-and-shoot, web cam and free image or photo editing tools like Picasa.	
▪ We control content for a blog, newsletter, publication, or social media account.	
Budget	/4
▪ We have a campaign budget.	
▪ We have money or incentives for staff training.	

Resource Selection (cont'd)

Standard of Quality	Rating
RESOURCES (cont'd)	
Story Subjects	/6
▪ Members of the organization and/or members of the public use our platforms to comment and engage in conversations.	
▪ Our staff has frequent conversations with members or with the public either in-person or via phone, social media, or email.	
▪ If asked to provide a source for a media story, I would be able to find a subject before the end of the day.	

Tally your final scores. Then, use the chart below to plot your alternatives for practicing storytelling efforts in-house vs. outsourcing them to an agency. A high score is over half of the available points. A low score is half the available points or fewer.

Low Experience, High Resources	**High Experience, High Resources**
1. Invest in staff training. 2. Devote part of the campaign budget to "sandbox" sessions to allow staff to experiment with storytelling. 3. Hire a storyteller or consultant to work full- or part-time on storytelling.	1. Instead of spending the entire budgte on one agency project, launch several small budget in-house stories. Use them as test cases to discover which content resonates with target audiences. 2. Push the envelope – use the latest platforms and technology. (See Tool #16: Channel Takeover Guide)
Low Experience, Low Resources	**High Experience, Low Resources**
1. Practice in-house. Have staff interview one another or host storytelling circles. As skills improve, begin more advanced storytelling practices. 2. If you're low on story subjects, make a conscious effort to conduct more outreach. Start by replying to conversations on social media and build from there.	1. If you don't have the professional tools or equipment for storytelling, opt for storytelling on social platforms where smartphone content performs well. 2. If you're lacking story subjects, focus on building better relationships with sources. (See Tool #8: Collection Form Template)

#3: Story Bank Selection Criteria

Overview

One of the most essential tools in building and sustaining a successful organizational culture of storytelling is a story bank. At its most basic, a story bank houses the stories (and storytellers) the organization collects or interacts with. It tracks content and relationships—both of which can have many sources of inputs and outputs. Good story banks will encourage collaboration across the organization, will be easy to use, and will streamline the process of connecting a good story (or storyteller) with the audience that needs it the most. Use the following worksheets to formulate a better organizational understanding of the common reasons for using a story bank and the types of story banks that are used. The tools will help you think through which storybanking solution, from the most simple to the most complex, is right for your organization, as well as what fields you should be tracking.

Outcomes

- Assessment of story bank needs and potential solutions
- Template of key data points to consider tracking in your story bank

Estimated Completion Time: 10 - 15 minutes

Identifying Storybanking Needs

Regardless of whether your organization's story needs are managed individually (with one person managing all related activities) or collaboratively (with more than one person or team contributing), having a system in place to catalogue and track all story-related content is a necessity. Storybanking solutions can range from the simple (an Excel spreadsheet) to the complex (an app that integrates with your customer relationship management software). The sophistication of the system you use depends on a number of different factors. In general, teams should consider investing in a more formal storybanking solution if any of the following apply:

- ❑ If you have a high volume of story or media contacts to manage
- ❑ If you have difficulty tracking and updating story sources' contact information
- ❑ If you cannot meet internal or external needs for storytelling in a timely manner
- ❑ If you cannot meet storytelling needs without recycling interview subjects
- ❑ If you cannot hand over storytelling to another team member without hiccups
- ❑ If you have difficulty connecting stories or storytellers to broader organizational needs or objectives

Types of Story Banks

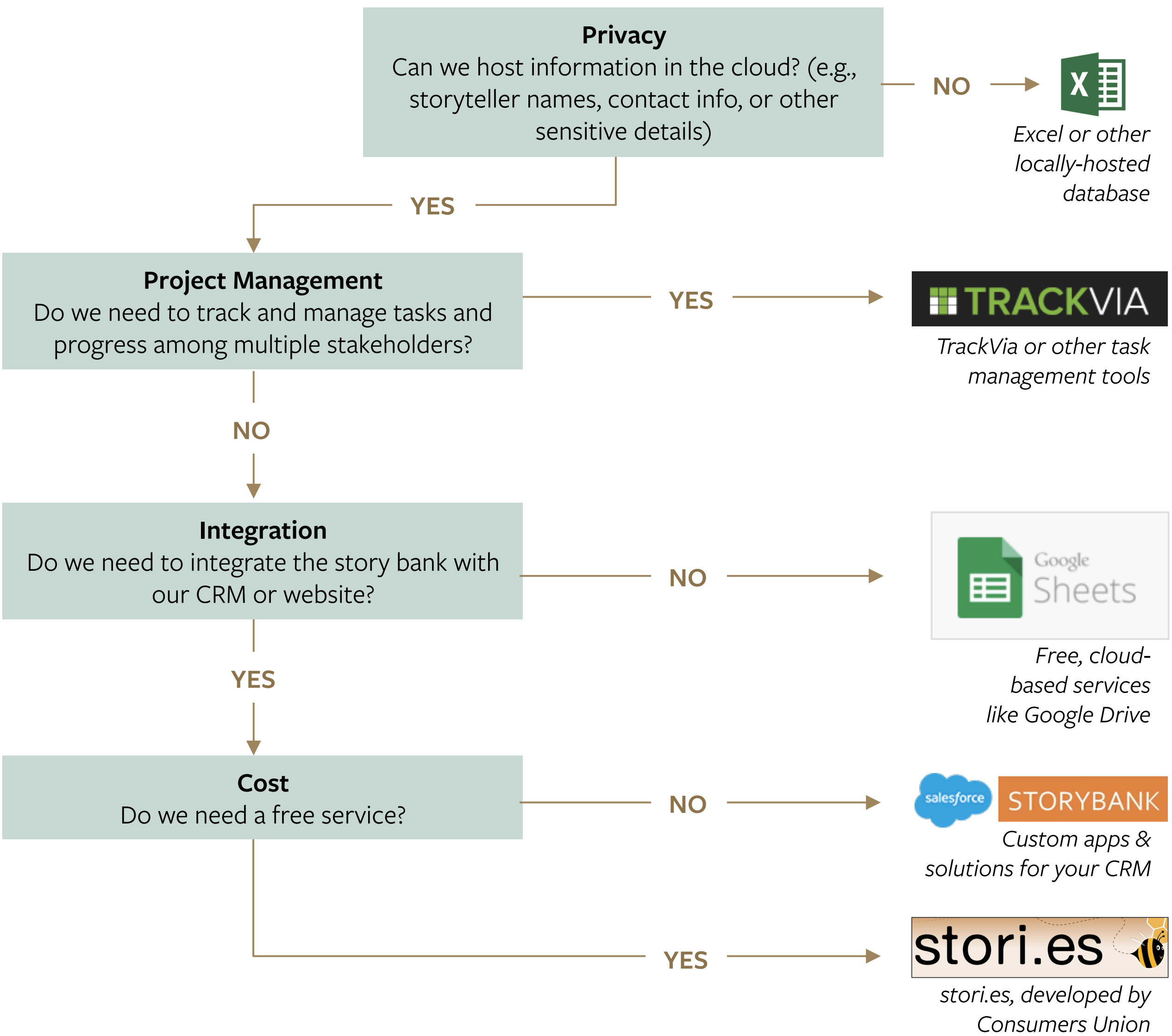
The best story bank for the organization is the one that utilizes technology similar to what staff are already comfortable using. The table below summarizes some of the most typically used solutions, ranging from least to most sophisticated, along with their key functions and use cases.

	Accessible Anywhere	Collaborative Editing	Searchable	Can Export Data	Edit History
Spreadsheet Software *Excel, Numbers, Calc*		Depends	X	X	Depends
Free, Cloud-based Software *Google Sheets, Zoho Sheet*	X	X	X	X	Depends
Software as a Service *Stori.es*	X	X	X	X	Depends
Application Integrated with Client Management System *Storybank for Salesforce*	X	X	X	X	X
Application Integrated with Task Management Software *TrackVia, OutSystems*	X	X	X	X	X
Custom platform or service	Depends	X	X	X	X

Identifying Storybanking Needs (cont'd)

How do you know which option is right for your organization? In addition to being distinguished by the key functionalities in the previous table, solutions also must adhere to your organization's unique needs and constraints.

Instructions: Use the following flow chart to get started in mapping potential storybanking solutions for your organization. After arriving at a solution, refer to the table on the previous page to ensure that the solution has all the functionality your team needs. If it doesn't, consider having internal conversations to address any constraints (for example, the need to integrate with a CRM, or budget).



Structuring Data Collection

Basic Data Collection

Most organizations, regardless of their needs, will have a story bank that looks similar to the template below. After that, options become highly customizable.

Contact Last Name	Contact First Name	Phone Number	Email Address	Story Keywords	Date of Last Outreach	Reason for Last Outreach	Recent Appearance / Publication
Doe	*Jane*	*202-555-1234*	*jdoe@yahoo.com*	*Animal rights*	*3/19/15*	*Media request*	*NYT A17 article 4/1/15*

Custom Data Collection

Organizations will include other data fields in their story bank based on their needs. Some common examples are included below.

Demographics – *age, sex, income, race, location, profession.*

Media Qualifications – *whether a person is interested and able to be interviewed for various media or public speaking events, such as local papers, television, radio, or in-person events.*

Notes or Text – *a custom field for including long blocks of text. It's useful for story drafts or notes about the source.*

Date for Next Contact – *if you plan to post updates to your original story, add a date for reminders.*

Deletion Date – *some charitable organizations may not use the same source repeatedly. In these instances, include an "expiration date" for faster removal of data.*

Industry-specific Fields – *data that is unique but important to your organization and its storytelling needs. For instance, if you are advocating for health care, you may wish to know whether the person is insured or what type of insurance plan they have.*

#4: Culture Change Toolkit

Overview

As communicators, we naturally understand the power of a good story. This sentiment is not always shared by all of our colleagues within the organization, which can make it difficult to allocate resources or to generate enthusiasm and support for our efforts. Use this toolkit to arm yourself for these challenging conversations. It will guide you through the necessary benchmarking research and internal tests you can run to demonstrate that your stories are worth investing in, and it will provide you with a template for more productive—and successful—conversations.

Outcomes

- A strategy to guide resource investment conversations with internal stakeholders
- A set of succinct, data-driven talking points to use with senior leadership or other skeptical peers and colleagues

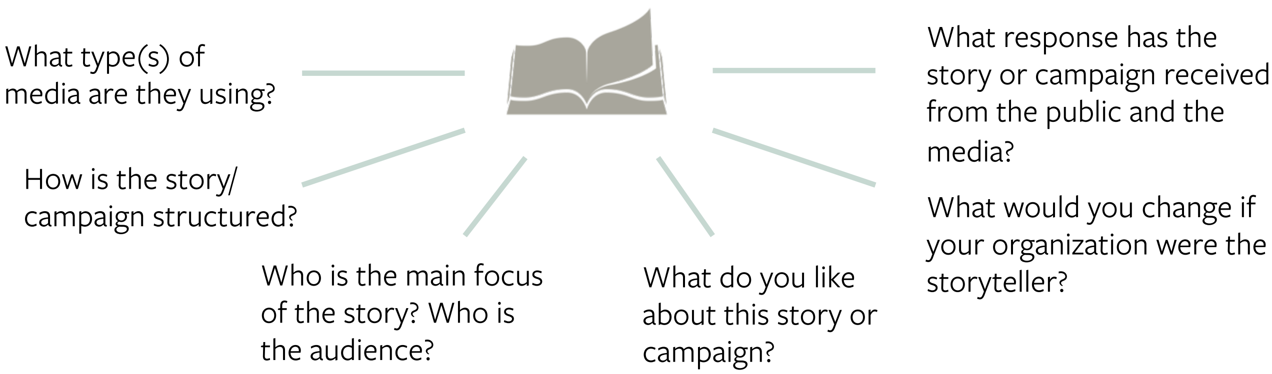
Estimated Completion Time: 90 Minutes

Making the Case for Stories

The exercises below are a terrific starting point in determining organizational goals that will benefit from storytelling. Remember to be specific and thorough in your responses.

1. Research the Competition

Peer pressure can be a powerful motivator—especially in Washington. Find at least three other organizations that use storytelling in a way that should be mirrored at your organization. For each example, dissect the story or campaign using the diagram below. If possible, talk to the original story's creators at the organization to get thorough answers to your questions.



2. Prepare a Cost-Benefit Analysis

Next, consider the resources it would take to develop a storytelling strategy at your organization. When considering costs, also consider benefits. This will help you mount counterarguments when you present your proposal to leadership. Use the sample questions we've included in the table below to get started.

	Cost	Benefit
Budget	*Would the cost of storytelling be diverted from another campaign or a new expenditure?*	*Could effective storytelling be repurposed for other uses, which would save money overall?*
Staff	*How many people would be working on this story/campaign full time?*	*Could telling stories improve other staff skills, making them more efficient at other tasks?*
Time	*How long will it take to develop a storytelling campaign?*	*Could stories be gathered during parts of other activities, such as when meeting with advocates?*

Making the Case for Stories (cont'd)

3. Test the Waters

If possible, complete small storytelling test runs to gather data about performance before presenting your arguments to leadership. Simplified steps for conducting an A/B test on social media are included below.

I. Test Subjects

Post A: A newspaper-style interview with a stakeholder. Headline should indicate it's an interview.

Post B: The same interview rewritten as a story. Headline should indicate it's a story.

II. Methodology

Week 1: Post A goes up on social media. Gather performance data.

Week 2: Post B goes up on social media on the same day and time as Post A originally went up. Gather performance data; include the metrics your organization typically uses to gauge a post's success.

III. Results

Compare performance data between Post A and Post B. To determine if the difference between posts is significant, try an online source, such as http://getdatadriven.com/ab-significance-test.

Building a Coalition

4. Find Storytelling Proponents

Who within your organization might be enthusiastic about storytelling? Take time to interview other teams and learn about their interests. Try to find at least one other outside team that would be willing to work with you to adopt storytelling. Possible opportunities are listed below.

Policy

Could you use stories to...

- ✓ Recruit advocates?
- ✓ Persuade representatives?

Research

Could you use stories for...

- ✓ Case studies?
- ✓ Research reports?

Membership

Could you use stories for...

- ✓ Recruitment?
- ✓ Member satisfaction?

Marketing

Could you use stories for...

- ✓ Public speaking?
- ✓ Branding?

Preparing Your Final Report

Before you advocate to leadership, gather your research and collaborators and create a ready-to-launch plan. If leaders say yes to storytelling, you will be prepared to start immediately. If they have questions, you will have thought through every detail as thoroughly as possible.

5. Craft a Reporting System

Determine the following key components of your high-level storytelling strategy:

Roles & Responsibilities

- ❑ Who is collecting stories?
- ❑ Who is writing, shooting, and editing stories?
- ❑ Who is promoting finished stories?

Platforms

- ❑ Where will stories be shared?
- ❑ What does success look like on each of these platforms? How will you measure that? (See Tool #18: Key Indictor Selection for ideas on crafting measurable story objectives)
- ❑ How often should new stories be posted?

Goals

- ❑ What will stories accomplish for the organization?
- ❑ How long will the campaign last?
- ❑ How many people do you expect will engage or interact with it?

6. Have a Contingency Plan

If anything in the reporting system outlined above goes wrong, you should have a plan to correct it. Create contingency plans for:

- ❑ Poor Engagement
- ❑ Insufficient sources
- ❑ Fact checking
- ❑ Poorly crafted stories

7. Frame Success in Leadership Terms

Consider how leadership will benefit from storytelling...or hurt from a lack of storytelling.

Compare to Peers

Benchmark your storytelling efforts with those of similar organizations. Could storytelling give you a leg up?

Walk in Their Shoes

Research public speaking events executives in your office take part in so you can offer concrete examples of your "narratives in action."

Be Precise

Be as concrete as possible with any estimates for spending or engagement. Confident measurements mean fewer headaches for leadership.

Chapter Two: Developing a Story Strategy

Objectives:

- To develop a goal-oriented approach to storytelling
- To synthesize story themes and focus the organization's message

Tools:

#5: Audience Persona Worksheet
Tool to improve understanding of characteristics of key story audiences

#6: Values and Issues Map
Worksheet to assist in surfacing the right stories to support strategic priorities

#7: Character Supply Chain Map
Worksheet to identify and assess potential characters and storytellers across the life cycle of an issue or priority

#5: Audience Persona Worksheet

Overview

The exercises in the following worksheets will help you identify your target audience. You will create a persona that everyone in the organization can use as a common reference point. By synthesizing a variety of data points down to a few unique details, the characterization will feel relatable while still representing a complex group of people.

Outcomes

- Profile of the campaign's target audience
- Compilation of audience's interests, media usage, and past engagement

Estimated Completion Time: 1 to 2 hours (longer if your organization has never researched its audience)

Step One: Formulating Hypotheses & Conducting Research

Formulate a Hypothesis About Your Target Audience

You likely have an idea of who you would like to engage with storytelling. Write a hypothesis statement that answers the following two questions.

- *Who is your target audience?*
- *What problem can you (and only you) help them solve? Or, what service can you (and only you) provide for them?*

Hypothesis:
Our audience is ______________________________ and we can do ______________________________ for them.

Consider what evidence you would need to prove or disprove your hypothesis. Then record test statements.

Test Statement 1:
If our audience is X, then they should *say* Y.

Ex: If our audience cares about paper, they will say they prefer print to e-books.

Test Statement 2:
If our audience is X, then they should *do* Y.

Ex: If our audience cares about paper, they will buy more print products than the average consumer.

Counter Arguments:
Argument 1: What other reasons could explain why our audience is saying Y?

Ex: They dislike e-books because the screen is too small.

Argument 2: What other reasons could explain why our audience is doing Y?

Ex: Likelihood of buying print products isn't linked to preference but is linked to age. Older people are less likely to be technically-savvy and use print products because they are familiar.

Test Your Hypothesis

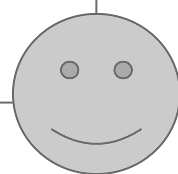
Research your audience, gathering evidence for or against your test statements. Use the template below to guide your data collection. If your hypothesis is not strongly supported by the evidence, revise it and start again.

Potential Sources of Evidence:	
▪ *Social media* ▪ *Surveys* ▪ *Interviews*	▪ *Member message boards/listservs* ▪ *Member databases* ▪ *Other* ____________________
Evidence For Hypothesis:	
Source: *Facebook*	Evidence: *15 likes on topic post; sample comment: "LOVE this! More posts like this please!"*
Source:	Evidence:
Evidence Against Hypothesis:	
Source:	Evidence:
Source:	Evidence:

Step Two: Developing an Empathy Map

Instructions: When your hypothesis is supported, use the template below to organize your research into an empathy map. We've included an example below to help you get started.

What do they think about? (*repeating themes & topics*) *Preparation is important*	**How are they feeling?** (*observed attitudes & emotions*) *Excited for educational opportunities*
What are they saying? (*quotes*) *"LOVE this! More posts like this please!" – FB poster, on storytelling webinar post*	**What are they doing?** (*quantified actions – online, in-person*) *Liking posts on FB but not clicking through to the website*



Insights:

Summarize any key final impressions of your audience.

Step Three: Creating an Audience Persona

Assign a Group Name

Give your audience an identifier that briefly summarizes who they are. For example, terms like "Hipsters," "Millennial Moms," or "Progressives" are often used as shorthand for different groups of people with shared behaviors.

Group Name: ______________________________

Compile the Persona's Key Characteristics

Instructions: Use the template below to create a profile of your target audience's common features. If you need help getting started, we've included an example on the next page.

Demographics: *Age* *Income* *Education* *Location* *Other (sex, marital status, race, ethnicity)*	**Values and Goals:**
Challenges:	**What is a day in their life like?**
Where and How Do They Encounter Our Organization:	

Sample Audience Persona

The persona below is an example inspired by Paper and Packaging Board's "How Life Unfolds" campaign. It borrows from P+PB's published resources.* Use this to guide your persona creation.

Group Name: The Expressives

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Demographics:

"Expressives represent about 30% of the 18-49 population or 38 MM consumers and are evenly split between men and women."

"They are shoppers, hitting the grocery stores 1-3 times a week as well as online. Fifty percent order online once a month or more; They are more frequent readers of books, catalogs and magazines."

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Values and Goals:

"This group is influential among their friends, are not afraid to share their accomplishments and take pride in their work and individualism."

They value:

- *creativity*
- *learning*
- *the environment and sustainability*
- *appreciating special moments*
- *career*

"see themselves as the first of their friends to try new products and their lifestyle choices are meant to impress others and follow latest trends"

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Challenges:

Growing popularity of digital

Belief that paper is "bad" for the environment

Potential for public backlash as the campaign goes national

Getting more brands to embrace the paper packaging we've identified as popular with Expressives

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What is a day in their life like?

Expressives "use paper and packaging to help them get the work of life done-on the job, at home and across all aspects of their lives." Their job is an important part of their lives, but they also make time for their families. Paper uses include school work, jobs, and creative hobbies. Many expressives will use paper goods when other alternatives are available, such as preferring print books to e-books.

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Where and How Do They Encounter Your Organization:
Currently, they can find P+PB online and on tv. The goal is to get their attention in video and then move them towards other outlets: HowLifeUnfolds.com, TV commercials, print and digital ads, and on Facebook, LinkedIn, Twitter, YouTube, Pinterest, and Instagram

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*Available at: http://www.paperandpackaging.org

#6:
Values and Issues Map

Overview

It can be difficult to translate policy or communications goals into emotionally riveting storytelling. While some groups might have an obvious human connection, others struggle to find the human interest message within their subject matter. How can a nuclear arms manufacturer or a landfill manager create a campaign that connects with people while still having an honest and meaningful message? Use the following exercises to transform your campaign messaging into values that resonate with everyone.

Outcomes

- List of core organizational values
- Mapping of key campaign issues to universal themes
- Theme statement and value concepts to guide story creation

Estimated Completion Time: 30 - 45 minutes

Finding the Underlying Values in Campaign Messaging

Define Organizational Goals/Campaign Strategy

Organizations often get caught up in the day-to-day details of communications strategies, but deeper values lurk beneath the surface. For any campaign, connect with your human interests by asking yourself the following:

1. Who do we serve? Or, on whose behalf are we campaigning?
2. What makes the work we do valuable?
3. How would the world be different if we didn't do it? Or, who would be harmed if we weren't doing it?

Refocus the Picture

Aesop is remembered over a thousand years after his death for stories about mice and crows, but of course, that's not why the stories are memorable. At the heart of each, there's a lesson about how to live well. Remove the mice and crows from your campaign strategy. How are you helping people to live a better life?

Instructions: Use the table below to map your organization's core values. In "Statement," write the answers you derived from step one. In "Issues," write the policies supporting each statement. Finally, in "Values," go broad—frame your issue in terms of values common to everyone in a society. Consider the following example.

Statement	Issues	Values
"We serve health insurance providers and the many in health care who are employed by these providers."	*Health care* *Insurance* *Employment* *Business*	*Care for the vulnerable* *Preparation for the unexpected* *Opportunity* *Providing for the community*

Bringing Values in to Story Concepts

Formulate Your Story's Theme

Like Aesop's fables, your story should have a lesson that can be summarized in a simple statement. The statement should take a stance on values and human nature. In literature, this is known as a "universal theme." **The universal theme is never stated explicitly. It is inferred by the events in a story.** This exercise will help you find a theme to guide your story.

1. Pick one of the values listed in the previous exercise's table.

2. Write a theme statement using the example templates below for guidance.

It is important to **(*value statement*)** because without it **(*negative consequence*)**.

If we do not **(*value statement*)** then **(*negative consequence*).**

Example:
It is important to <u>prepare for the unexpected</u> because without preparation, we <u>jeopardize our future</u>.

Brainstorm Theme Representations

<u>*Instructions:*</u> Write your theme's value in the circle below. Then fill in the circle with as many people, places, things, quotes, analogies, or ideas that you feel represent that value. Think of as many concepts as possible. The circle on the left has been filled in as an example.

Example:

Preparation
Animals in winter, hibernation
Boy Scouts
Storm warnings, flood evacuations
Salting roads before snow
Preventative care – cancer, prenatal, etc.
Setting the table for dinner
Research before traveling to a new country
Packing for camping trip
First aid kit

Draft Your Story

Use your theme statement and the story concepts from your brainstorming session to begin crafting your narrative. For additional guidance and next steps, see Tool #11: Plot Development Worksheet, Tool #7: Character Supply Chain Map, and Tool #12: Emotion Map.

#7: Character Supply Chain Map

Overview

Whose story should we tell? Sometimes the most compelling stories come from unlikely sources, and being able to demonstrate how an issue impacts a broad array of stakeholders or constituents (instead of relying on the same formulaic narrative each time) can make your story more relatable and, ultimately, more effective. It helps to think of your industry or issue in terms of a supply chain: who are the players along the way that interact with or are impacted by various events or changes? Some supply chains may be shorter or longer, more or less complex than others, but the goal is to think more holistically when sourcing your stories, rather than relying on the same pool of senior executives or consumers/end users.

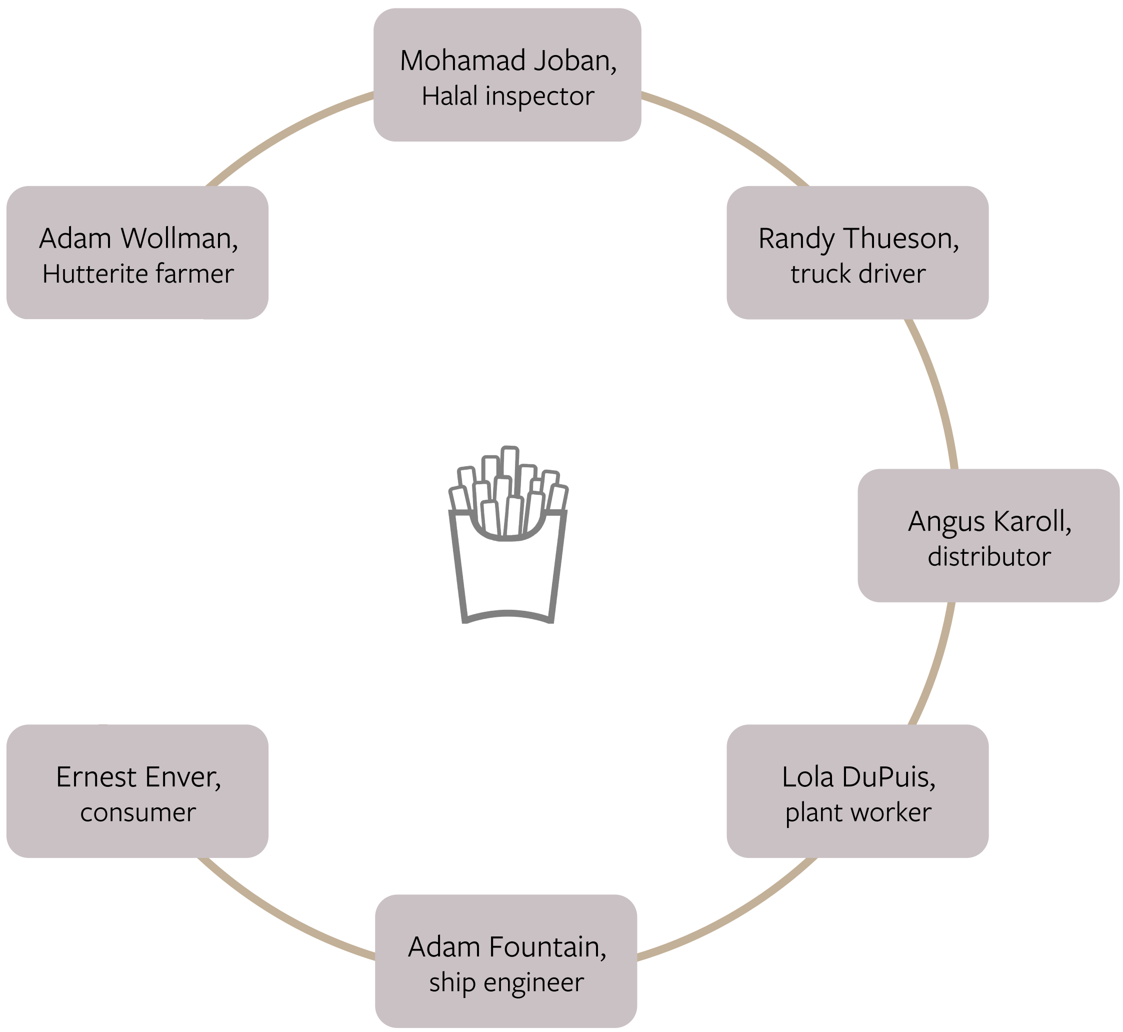
Outcomes

- A visual map of characters affected by or involved in your industry or issue
- Sample prompts to help foster character relatability

Estimated Completion Time: 30 minutes

Visualizing an Industry or Issue

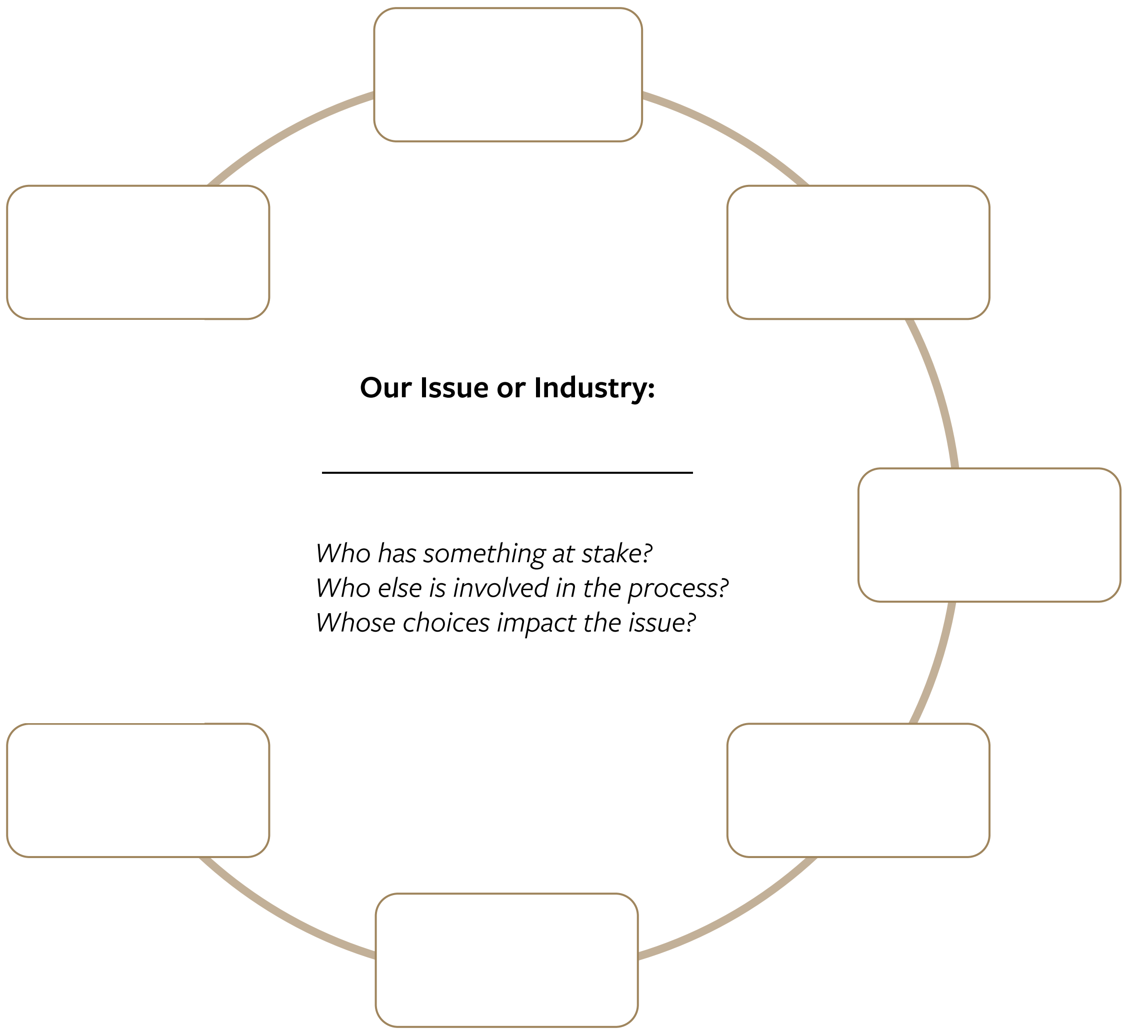
Perhaps the gold standard in taking a "supply chain" approach to characters comes from the Pulitzer Prize-winning article "The French Fry Connection," published by *The Oregonian* in 1998.* In it, the author illuminates the wide-reaching impacts of the Asian financial crisis by telling the individual stories of more than eight different characters—all of whom play a role in the process of producing or consuming a McDonald's french fry! In the diagram below, you'll see a map of the story's character supply chain.



Instructions: On the next page, you'll find a blank version of this supply chain map. Practice filling it in for several of your key issues or industries. Aim to fill in at least three to four of the steps for each issue or industry. This will ensure diversity of perspectives, not only within an individual story, but across the many stories your organization tells.

*Available at: http://www.oregonlive.com/editors/index.ssf/2013/04/the_french_fry_connection.html

Visualizing an Industry or Issue (cont'd)



Creating Relatable Characters

Now that you've identified a variety of individuals who have great stories to tell or perspectives to offer, think about how you're going to introduce and define those individuals to your audience. Too often, we encounter one-dimensional characters—defined only by their relationship to the industry or issue-at-hand. If you take the time to flesh out your characters as human beings first, they'll be much more relatable to your audience, which will make your story more persuasive.

Creating Relatable Characters (cont'd)

Returning to our initial "French Fry" example, take a moment to review how the author first introduces several of the characters to the audience.

Randy Thueson, truck driver

"Randy Thueson helped fire rockets at North Vietnam when Nixon administration hawks warned that Southeast Asian countries could topple like dominoes to communism."

Angus Karoll, distributor

"The day Jakarta burned, Angus Karoll struggled to keep 550 tons of french fries out of the fire."

Adam Fountain, ship engineer

"Adam Fountain looked more like a shoestring traveler than an engineer. He pulled Walkman earphones from his ears. He brushed water from his dripping beard. He squeezed his sopping, overstuffed backpack into an elevator to the bridge."

Notice the way the author highlights things like personal history, actions, or even personal appearance, rather than leading with the character's title or job description. But, the challenge is that we often don't know much about our characters beyond this perfunctory information, so we must plan in advance to obtain as much of it as possible.

Instructions: Use the planning table below and on the next page to take stock of what you know about your potential characters—and what you wish you knew. This will help you to evaluate whether the characters you identified in your supply chain on the previous page are viable options as future storytellers.

NOTES	**Who owns the relationship?** *How can we connect with him/her? Who can intervene if necessary?*	**How is the character connected to the issue?** *What unique role in the process or vantage point can s/he convey?*	**What can humanize that connection?** *What else do we know about the potential character? What gaps exist?*
Character #1			
Character#2			
Character #3			

Creating Relatable Characters (cont'd)

NOTES	**Who owns the relationship?** *How can we connect with him/her? Who can intervene if necessary?*	**How is the character connected to the issue?** *What unique role in the process or vantage point can s/he convey?*	**What can humanize that connection?** *What else do we know about the potential character? What gaps exist?*
Character #4			
Character#5			
Character #6			
Character #7			

Chapter Three: Collecting Story Assets

Objectives:

- To organize a process for discovering capable storytellers
- To create a system for collecting member stories
- To increase the quality of story assets and/or content being collected

Tools:

#8: Collection Form Template
Sample form to use in soliciting story content

#9: Story Contest Protocols
Checklist of considerations to guide incentivized, crowdsourced storytelling efforts

#10: Sample Interview Questionnaire
List of questions to pose to elicit more useful content from storytellers

#8: Collection Form Template

Overview

The story collection form is a welcome mat for your organization. The right story form will encourage members, advocates, and/or supporters to engage with the organization, while also eliciting the appropriate amount of information for the organization to determine whether follow-up is necessary. Use the following templates to create an effective online story collection form, including how to introduce yourself to people outside of the organization and the questions you should ask to get honest, descriptive responses.

Outcomes

- Story form template, including mission statement for story collection

Estimated Completion Time: 30 - 45 minutes

Writing Effective Story Prompts

Begin with a Mission Statement

The mission statement is the introduction to your story form. It should be brief (no more than 2 to 3 sentences), friendly and encouraging. It should explain:

1. Who you are:
   - *What's the name of your organization?*
   - *What's your organization's mission?*

2. The goals of your campaign:
   - *What do you hope to achieve?*
   - *Why is this campaign important?*

3. What types of stories will be included:
   - *What topics should stories address?*
   - *Who should submit stories?*

4. How stories will play a role in the campaign message:
   - *Where will stories be published?*
   - *Who is the potential audience?*

Sample Statement:
*"We are (1)__________________ and we're trying to (2) ___________________________.
Please help us by taking two minutes to share (3)___________________________, or visit our 'Shared Stories' page to see how others have been affected. All stories will be used for (4) ______________________."*

Write your mission statement below:

____
____
____

Then Create a Motivational Narrative Prompt

Most story forms include a section where users may share openly. The best inquiry will guide respondents to describe an event and explain its cause and effect. Avoid the generic "tell us your story" prompt, which can be confusing and intimidating. Instead, ask open-ended questions that inspire thoughtful before-and-after responses. Be specific about your interests in your request. For example:

How has your daily life been affected by ______________________?
Why did you decide to get involved in ________________________?
What has changed since ________________________?

Write your narrative prompt below.

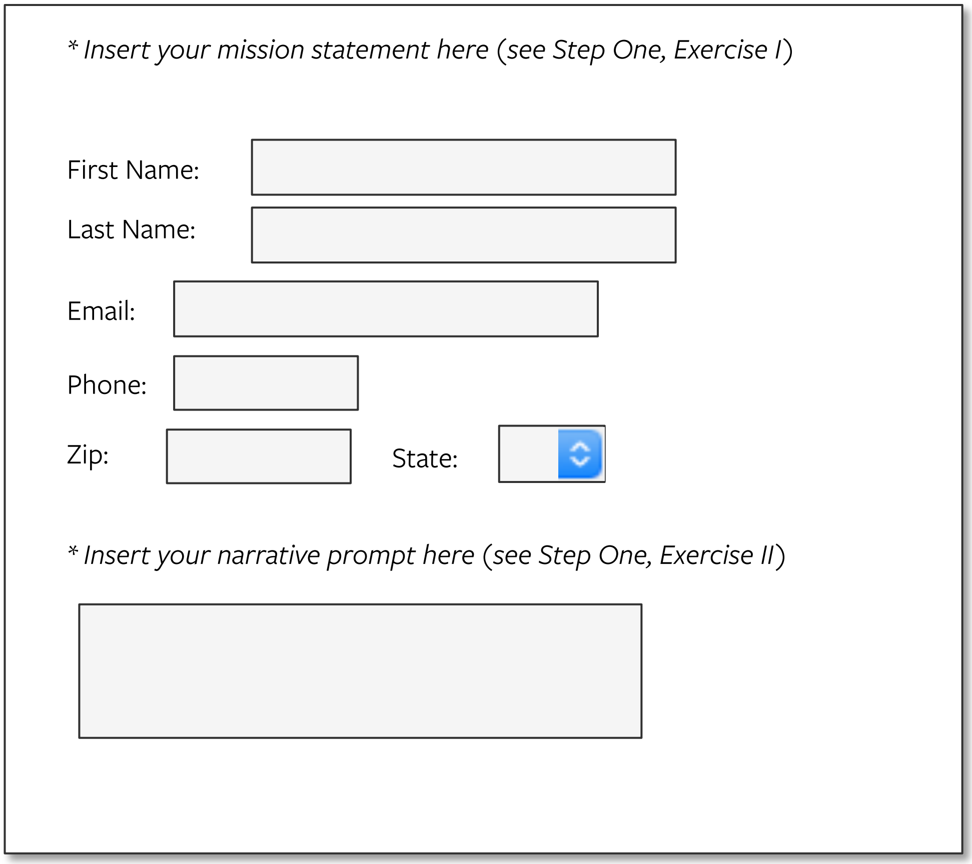
____
____
____

Building the Story Collection Form

Story Form Template

Insert the previous two exercises into your story form. The template below can be adapted for your web site, social media, or printed submissions.

If you're interested in integrating the story form with a story bank, see Tool #3: Story Bank Selection Criteria for more information.



* *Insert your mission statement here (see Step One, Exercise I)*

First Name:

Last Name:

Email:

Phone:

Zip: State:

* *Insert your narrative prompt here (see Step One, Exercise II)*

Do Longer Forms Lead to Lower Response Rates?

The story form shouldn't be comprehensive; it should be the starting point of your relationship with the respondent. Some organizations believe a short request form increases the chance of engagement.

Others say if you decide to ask for more information, consider the following ratio: for every question that provides information to the organization, ask an additional question that is rewarding for the respondent. Typically, these rewarding questions allow the person to describe themselves or a topic they care deeply about. They can also be questions that make the respondent's contribution feel more valuable.

#9:
Story Contest Protocols

Overview

The allure of prizes, the promise of good luck, the demonstration and focus of skill—few can resist competing in a contest. Fortunately, when it comes to storytelling, contests are a win-win. Organizations that use contests to surface stories have found that there are many benefits. Contests identify the most highly engaged members and reward them for their loyalty. They promote the organization without seeming self-serving, and they can boost member satisfaction. They also quickly generate a high volume of story leads. Use this guide to walk through contest creation, promotion, and execution, covering everything from contest design to the prizewinner announcement.

Outcomes

- Guide for structuring contest challenges and prizes
- Editorial calendar for promotion

Estimated Completion Time: 15 - 20 minutes

Step One: Designing the Contest Challenge

Define the Contest's Goals

Storytelling contests should promote the organization's values and bring in stories that do the same. Use the questions below to write three contest goals that correspond to these needs.

1. **Storytelling Goal:**
   What kinds of stories are you hoping to collect?

2. **Organizational Goal:**
   What behaviors or attitudes do you want to promote within participants? For example, pride in the organization or commitment to service.

3. **Participation Goal:**
   Who should be your organization's storytellers? How many entrees would you like to receive?

Determine the Contest's Prize

The right prize motivates observers to become participants, but the wrong prize can result in low participation or participation from people uncommitted to the organization. The right prize should:

- ❑ Meet a want or need the participant can't easily fulfill on his or her own
- ❑ Be connected to the organization's values
- ❑ Have weight, honor and recognition
- ❑ Include additional awards and praise for the runners-up

Examples: free or reduced conference admission, invitation to exclusive industry event, recognition at a conference ceremony, etc.

Construct the Challenge & Rules

The challenge should meet the goals you defined above, but it should also create a sense of possibility. Use the formula below to ensure your contest challenge balances the needs of the organization with the expectations of participants.

Perfect challenge	=	***Fairness*** Rules and judging standards are clear and publicly documented	+	***Chance*** Odds of winning seem equally likely for any participant	+	***Skill*** The challenge takes effort, but does not require special talents	+	***Potential for Reward*** The promise of the prize motivates participants to compete

Step Two: Promotion and Momentum

Create an Editorial Calendar for Promotion

Your contest will have built-in milestones. Pre-plan content to coincide with those dates and to increase engagement. Consider the examples below.

During the First Weeks:

Launch With Inspiration
Begin the competition on the right foot by creating your own entries and offering a behind-the-scenes look at their creation. This will get the wheels spinning for anyone who's interested.

Offer Incentives for the First Entries Received
A week or two into the competition, give small tokens of recognition to those who have already entered. Consider small awards that won't affect the outcome of the overall contest, like free organization swag or a shout-out on social media.

Engage Non-Participants
Launch a simultaneous, complementary activity for those not eligible to participate in the contest. For example, organizations have hosted people's choice awards or created social media campaigns and microsites for members of the public to offer inspiration or suggestions to participants.

Throughout the Competition:

Post Updates on Blogs and Social Media
Start a blog series that updates participants on the contest process, including interviews with contest judges or weekly inspirational posts.

Release Training: Webinars, Online Q&As, or Toolkits
Storytelling isn't a skill that comes naturally to most people. Consider offering free lessons on how to tell the types of stories that should be submitted.

The Finale and After:

Announce the Winners at an Event
Most organizations have their highest engagement during annual conferences. If possible, drive this attention to the contest and your participants.

Get Winning Content Recognized in Other Media
Often local media will pick up stories highlighting individuals or businesses, but some organizations have also had success with national media. Try reaching out to niche bloggers or social media personalities as well.

#10: Sample Interview Questionnaire

Overview

A reporter for *The New York Times* once marveled at the art of the interview, as experienced by those on radio host Terry Gross's show. She summarized their experience as, "Every single time I hear a Terry Gross interview, I wonder what it would be like for her to do some research on me and do an interview." For most people, the idea of an interview induces anxiety. We think of a job interview gone wrong or that poor person who went viral after making a bad statement to the local news. The following interview template is crafted to avoid such scenarios. It provides questions and tips for organizations who want to conduct interviews that are simultaneously comprehensive and respectful.

Outcomes

- An interview process checklist
- Sample interview questions

Estimated Completion Time: 30 - 45 minutes

Sample Interview Questionnaire

The two columns below illustrate how to conduct interviews for storytelling. The first column contains an outline of the process and sample questions. The second column contains an actual interview conducted by the Consumer Technology Association as part of their "Startup Stories" series.*

Introduction

Ease the subject into the process with questions that will be easy for them to answer.

- Establish the reason for the interview; set the tone for the conversation.
- Start with background questions.
- Confirm spellings and pronunciations. For example, by asking, "Baczuk? Could you spell that for me?"

Foundation

Get the details that make a story immersive. Ask questions that will explain emotions, motives, or beliefs. (*See Tool #12: Emotion Map*)

Sample Questions:

- "What do you remember about ____________?"
- "Walk me through what happened next."
- "How did that make you feel?"

Losing track of a child can be the single most terrifying moment of a parent's life. That's why Spencer Behrend, the founder and CEO of KiLife Tech, created a solution. The Kiband helps parents keep their kids safe while still allowing them to explore and learn about the world around them.

How did KiLife Tech first start and how did you first get the idea for the Kiband?
"KiLife Tech was started after my own experience with my son Kimball. When Kimball was just two years old he disappeared into the crowd at a 4th of July parade during a split second of distraction. Fortunately, he was found after several minutes of panicked searching but he could have been lost forever. After that terrifying experience, and not wanting to constrain Kimball's adventurous spirit, I began looking for solutions to empower Kimball to explore the world while still providing a reliable safety net. That's when I met Jordan Baczuk, a graduate engineer who was passionate about real time radio signal processing and environmental mapping with radio waves, and the rest is history, as they say."

What problems were you looking to solve when you started your business?
"Early on we discovered, through thousands of hours of observation, research, surveys and focus groups, that parents struggled with a dilemma, and it was a significant one, and it's not how to locate a lost child. It's how do we keep our kids safe AND give them the freedom to grow by exploring the world around them. It's a constant battle. Understanding the right problem was key because it leads to the right solution."

*Available at: http://www.cta.tech/Blog/Articles/2015/October/Startup-Stories-Heres-How-Tech-Can-Help-Avoid-a-P.aspx

Sample Interview Questionnaire (cont'd)

Foundation (cont'd)

- "Tell me more," or "Can you explain that?" are simple questions to ask that will elicit more detail from the subject

Other tips:

- Repeat statements back as questions to get more details. For example, if they say, "I was tired," ask them "Tired?"
- Practice the long pause. Most subjects will fill in gaps.
- After a few foundation questions, you've established that you care about the subject and the subject has warmed up to the interview process. This is the best time to ask about the organization's impact.

Conclusion

Give the subject a chance to speak openly. Make them feel glad they did the Interview.

- Ask them questions that trigger positive attitudes, such as pride or excitement.

Tell us a little about the Kiband.
"The Kiband, a child tracker, allows you to be mindful of your kids in any environment while allowing them to live an active life. Place the Kiband on your child's wrist with our patented one touch lock. You're in control with custom distances set from your smartphone using the Kiband app. More than a child GPS, the Kiband will work anywhere on the planet without monthly fees. And it works! When your child approaches the perimeter you set, the band and your phone will vibrate engaging the child in learning proximity. If the kid goes too far the band is equipped with an audible alarm that can be loud enough to be located in any environment, preventing a child from ever becoming lost."

You are a CEA startup member. How has membership affected your business?
"Being part of CEA Startup has been a huge resource for us. In addition to access to great content, we have an instant network of other companies facing the same challenges as us and the benefit of the great CEA community with access to experience to steer us away from pitfalls."

You recently rang the NASDAQ closing bell – tell us a little about that experience!
"That was unbelievable. For a young company like ours to have the opportunity to close the NASDAQ is surreal. How many startups have their name broadcast all over Times Square and three major news networks? Just a glimpse of great things to come for us we hope!"

Sample Interview Questionnaire (cont'd)

Conclusion (cont'd)

- Be sure to end the interview on a natural conclusion, such as asking what the person plans to do in the future or what they've learned from their past

Sample Questions:

- "What's your hope for the future?"
- "Is there anything I didn't ask that you would like to add?"

What's next for Kiband and KiLife Tech?
"Right now we are just laser focused on getting the Kiband to market. Bringing this child smartband to market, what we hope will become the symbol of child wearable, has meant overcoming huge challenges. We aren't just repackaging off the shelf BT tags or modules. This is a groundbreaking smartband platform focused on family adventure simplified."

Interview Checklist

A great interview isn't just about establishing rapport in the moment. Reference the tips below as you prepare for your conversation to ensure you'll be ready for publication.

Pre-Interview:
- ❑ Research the subject
- ❑ Prepare a list of questions
- ❑ Establish themes and concepts for the interview, possibly prewrite a story outline

During Interview:
- ❑ Be respectful but friendly
- ❑ Maintain the flow of conversation
- ❑ If using recording equipment, be sure it is functioning throughout the interview
- ❑ Confirm contact information for follow-up

Post-Interview:
- ❑ Write a draft of the story while details are fresh in your head
- ❑ Send a thank you note
- ❑ Fact-check the details before publication
- ❑ Send the final piece to the subject when it is published

Chapter Four: Crafting Compelling Stories

Objectives:

- To strengthen the organization's ability to identify and create stories that will move and motivate audiences
- To ensure that stories possess the required elements (plot, character, emotion)

Tools:

#11: Plot Development Worksheet
Formula to ensure that narratives possess a compelling arc and structure to lead audiences to a call-to-action

#12: Emotion Map
Worksheet to improve specificity and detail present in stories

#13: Sin Identification & Removal Worksheet
Worksheet and exercises to apply to current and future stories to assess and eliminate common organizational storytelling "sins"

#11: Plot Development Worksheet

Overview

One of the most common mistakes found in organizational storytelling is that nothing actually *happens* during the story. We are often presented with testimonials, in which we only see what life is like now—not what it was like before or during the character's interactions with an issue or challenge. Or, we are presented with simple summaries that lack narrative tension. In short, your story must have a beginning, a middle, and an end. It needs a plot.

Fortunately, there's a common formula that most stories—policy-related, or otherwise—follow, and it is easy to replicate and adapt. Use the following worksheet to frame out the key elements of your story's plot, and to uncover points of dramatic tension that can spruce up an otherwise mundane narrative.

Outcomes

- An understanding of the five key components of an effective narrative
- A flexible template for developing a plot that can be applied to diverse industries and issues
- A sample story that adheres to a replicable narrative structure

Estimated Completion Time: 60 minutes

The Core Five: A Concise yet Compelling Narrative

Organizations and the people they serve rely on one another to achieve a shared goal. Similarly, the ideal narrative serves two groups: the audience and the organization. The needs of both are not mutually exclusive. Instead, they work together to reach a common cause. The diagram below identifies the core structure of a compelling story, including definitions and an explanation of who is served by each section.

1	2	3	4	5
The Setting A physical place is introduced, a character or set of characters comes to life, and a critical issue is defined.	**The Climb** The character or community is faced with challenges that amplify the critical issue defined in the setting.	**The Final Challenge** The critical issue must be addressed by the characters head on.	**The Closing Actions** The dynamic of the story changes. Either the issue is solved, or it is open-ended and the audience feels a need for resolution.	**The Call to Action** The audience is encouraged to become a part of the solution. The story parallels parts of their own lives, invoking empathy and a desire to act.
Serves the Audience				*Serves the Organization*

Constructing Your Narrative

Instructions: The following prompts walk you through the process of developing your narrative. For each of the five core components, you'll respond to specific questions that help accomplish the overall goal of that section. When all five are complete, you'll have a foundation of a narrative that can be edited, adapted, and applied to multiple issues.

1 **The Setting**
Give details that help the audience see the setting as if they were viewing it with their own eyes.

- *How would you describe this setting/person/issue to someone who has never experienced it before? What features stand out in your memory?*
- *How did parts of the setting or character's personality contribute to the issue they are facing?*
- *What was your impression of this person/place the first time you met?*

Constructing Your Narrative (cont'd)

2

The Climb

Join the audiences' interests with the main character's. Show that the characters have tried to confront the issue themselves.

- *Why did the character believe their actions would make an impact?*
- *What was the character thinking as they confronted each small challenge? What were they thinking when each confrontation was over?*
- *What do they wish they had done differently?*

3

The Final Challenge

Make the audience question the best outcome for the characters. Put the issue solution in reach, but leave the pivotal moment in suspense.

- *Imagine the scene as if it were happening in slow motion. For each action, write three sentences to describe how it unfolded.*
- *What are all of the ways that this challenge is like the smaller challenges the character experienced during their climb? How is it different?*

4

The Closing Actions

The organization intervenes or the character is left in limbo, waiting for action. Give the audience time to reflect on how a lack of action completely changes the issue outcome.

- *How has the person been changed by their struggle?*
- *What would they do differently if they were placed in this situation again?*

5

The Call to Action

Link the organization's goals to the larger moral of the story. Empower the audience to act.

- *How can the audience partner with the organization to make lasting impacts?*
- *How have the organization's actions contributed to the solution of the problem and how could they help others in a similar situation?*

#12: Emotion Map

Overview

"Don't tell me the moon is shining. Show me the glint of light on broken glass."
This quote by Anton Chekhov illustrates one of the core principles that separates a story from a *good* story. Good stories are rich with details that paint a specific picture in the minds of their audiences. They're authentic. They show, rather than tell. But knowing which details to share and how to collect them can be difficult. The following worksheet breaks down the process of unearthing authentic details, and of transitioning from creating a story that merely "tells" to one that "shows." Use the worksheet to improve your interview questions or prompts, or to train staff on the kinds of questions or observations they should be using while in the field collecting stories. Use it to pressure test new stories you create, or to train your grassroots storytellers to be more comfortable sharing details in their stories. The end result will be more emotion, and more connection between your characters and your audiences.

Outcomes

- List of key questions and observations to use when collecting stories
- A more refined ear for authenticity, and a process for how to achieve it

Estimated Completion Time: 30 minutes

What Do We Mean by "Showing?"

The following are two different opening paragraphs for the same policy-related story. Take a moment and read each, paying close attention to how you feel and what you picture as you read them.

Paragraph #1:
Lauren Scott has been job-hunting for a while, with no success. She is a mother, and needs to provide for her 10-month-old daughter. She diligently prepares for interviews each week, many of which are far from her home and require lengthy trips on public transportation.

Paragraph #2:
She set off on the latest day of job hunting wearing tiny star-shaped earrings that belonged to her 10-month-old daughter and frayed $6 shoes from Walmart that were the more comfortable of her two pairs. In her backpack she had stashed a ham and cheese sandwich for lunch, hand sanitizer for the bus and pocket change for printing resumes at the public library. She carried a spiral notebook with a handwritten list of job openings that she's titled her "Plan of Action for the Week."
(*Excerpt from "A Lonely Road," The Washington Post, December 28, 2015**)

What makes the second one so much more compelling than the first? Details. We know that Lauren is a mother—not because the story tells us, but because she's wearing her daughter's earrings. We know that she desperately needs this job—again, not because the story tells us, but because she owns two pairs of shoes, and the better of the two pairs was purchased for $6 at Walmart.

What these details have in common is they are intensely visual. We can picture her shoes, in a very specific way. Try picturing "poverty," or "diligence"—both are too abstract to provide a clear visual, and without that clear visual, there's no connection. Your goal in telling stories should be to make your issue or impact move from being an abstract idea or concept in the mind of your audience to being a concrete image or feeling.

Creating A Plan to Collect Details

There are two ways to obtain these details when collecting stories: by asking for them, or by observing them. Both methods require having a plan in place ahead of time, so that you don't miss the opportunity to ask a crucial follow-up question or observe a key facial expression or action.

What kinds of details should we collect?

- ✓ Appearance
- ✓ Body language
- ✓ Facial expressions
- ✓ Clothing
- ✓ Surrounding environment
- ✓ Objects
- ✓ Actions
- ✓ What others say about the character

*Available at: http://www.washingtonpost.com/sf/business/2015/12/28/deep-south-4/

Creating A Plan to Collect Details

Instructions: Use this worksheet to walk through the process of translating what's happening in your story (the plot) and what the character is feeling (emotion) into details that show these rather than tell. For each major "beat" or part of your story, try to capture 1-2 specific, vivid details. Then, use the final column to brainstorm how you'll collect these details—either via specific questions, or by observing. The first row has been filled in for you, based on the sample story we examined on the previous page.

	TELLING		SHOWING	
	1. Plot *What's happening?*	**2. Emotion** *How is the hero feeling/ reacting? What does this reveal about his/her character?*	**3. Details** *How do you know #2 is true?*	**4. Source** *How can you obtain/ observe the details? What interview questions/prompts can you use?*
SAMPLE	*Traveling to job interview*	*Anxious* *Determined*	*Packed meticulously for the long trip; has a "plan of action" handwritten in a notebook*	*- Observe* *- Q: What do you pack when you travel to job interviews?*
Beat #1				
Beat #2				
Beat #3				
Beat #4				
Beat #5				
Beat #6				

#13:
Sin Identification and Removal

Overview

There are few ways to quantify what makes a story good, but our research has identified five characteristics that are common to bad stories—particularly in the Washington policy community. In the worksheets that follow, you will learn to recognize and avoid these mistakes, also known as "sins." Use the exercises on each page to identify the opposing storytelling "virtues," and to practice and strengthen good storytelling habits.

Outcomes

- Writing practices for reinforcing good storytelling behaviors
- A list of overused industry jargon and plain English translations
- A list of potential sources for storytelling

Estimated Completion Time: 1 hour

Sin #1: Pride vs. Humility

Pride:
The organization is the central character in the story. Other characters only serve to promote the message of the organization.

Characterized by:
- Excessive use of "we," "us," or the organization's name
- Emphasis on the organization's accomplishments at the expense of the individual

How Audiences React:
Unimpressed. If the organization seems too self-important, audiences will search for holes in the image the organization is projecting.

Humility:
The organization recognizes the importance of acknowledging the people they serve. Those stories take precedence over the organization's message.

Characterized by:
- Subtlety. The organization's message comes at the end of the story.
- The individual is often the narrator, or if not, is frequently quoted.

How Audiences React:
They are absorbed by the story before they are aware of how it is trying to persuade them.

Exercises to boost humility:

1. Write down three ways that you are inspired by your story subjects.

2. Explain why are you proud to let this person or persons represent your organization.

3. If you were in this person's place, how would you want your story to be honored?

Sin #2: Detachment vs. Compassion

Detachment:
A story fails to explain characters' thoughts or feelings. It lacks emotional appeal.

Characterized by:

- Missing emotion words: happy, sad, scared; thinks, believes, feels
- Lacking metaphorical language, such as similes and metaphors

How Audiences React:
Indifferent. They are unable to sympathize with the characters, which makes them less motivated to act.

Compassion:
The story accurately reflects the thoughts and feelings of its main characters. It explains the "why" of characters' actions.

Characterized by:

- Each character action has a motive
- Presence of emotion words and metaphorical language

How Audiences React:
They relate to the story and are more likely to feel involved in the action.

Exercises to boost compassion:

1. Replay a scene from a story in your memory, imagining you are the protagonist. Write down each event and how it makes you feel.

2. Consider how you want your audience to feel when they hear or see your story. Think of a time you felt that way because of a story you read, heard or saw. Write down what it was about the story that made you feel that way. Consider the plot, language, voice, and setting, or in the case of multimedia stories, consider how the visuals or audio affected your feelings. (See Tool #12: Emotion Map for more)

Sin #3: Pretension vs. Education

Pretension:

A story uses technical explanations and industry jargon without defining these terms in relatable language.

Characterized by:

- A high volume of acronyms, abbreviations, or words not found in a common dictionary
- Emphasis on process over people

How Audiences React:

Dazed or frustrated. They may not finish a story if they cannot do it without consulting Wikipedia.

Education:

The story is an opportunity to let the public into a world that may typically be off-limits to them. Everyday language is not seen as an inefficient way to discuss professional topics.

Characterized by:

- Plain language and patient descriptions
- If there are acronyms or uncommon terms, they are defined within the story

How Audiences React:

They feel empowered, smarter, and more informed. If they feel the knowledge they've gained is rare, they may evangelize and share.

Exercises to boost perception:

1. Describe a process you experience regularly but know nothing about; for example, write an explanation for how traffic lights work or what happens when you visit a web page. When you don't know what the next step is or how it works, write an explanation for what you imagine might happen.

2. Write out a list of all the terminology used in your industry. When you're finished, go back down the list and write a simpler definition for each term. Refer back to this list when you're drafting stories.

Industry Term	Plain English Explanation

Sin #4: Monotony vs. Adventure

Monotony:

Nothing is at stake in the narrative.
Characters never face risks or challenges.

Characterized by:

- Lack of action; mostly interviews, with very little description or plot structure. If it's a video, there's a higher chance it's a "talking head" video.
- No shifts in emotion. It's all positive or all negative experiences.

How Audiences React:

Expectant or bored. Audiences expect drama.

Adventure:

The narrative has unexpected events.
Characters experience changes by the end of the story.

Characterized by:

- Disruptive words and phrases, like however, suddenly, although, "without warning", "but then"
- Change in emotions, tone, characters, or circumstances

How Audiences React:

Curious, excited. Audiences want someone or something to root for.

Exercises to boost adventure:

1. Write about your day, imagining that you have to retell it for the big screen. How would you make it interesting without stretching the truth? Consider internal and external struggles. Teach yourself to recognize small moments or decisions and how those play out on a larger scale.

2. Reflect on a turning point in the history of your organization or in your own life. List at least two events that led to that change. Then explain the final outcome.

Turning Point:

Rising Action 1:

Rising Action 2:

Final Outcome:

Sin #5: Subservience vs. Independence

Subservience:
Organizational leaders are prominently featured in the story or may even be the heroes.

Characterized by:
- Lack of diversity. Most of the quotes come from internal sources.
- Quotes are only positive and may seem very flattering.

How Audiences React:
Skeptical. They may wonder why no one outside of the organization was willing to speak on the organization's behalf.

Independence:
The story stands on its own. If you removed the organization's messaging and leaders, the narrative would still make sense.

Characterized by:
- Interviews with everyday people
- Events that take place outside of the organization

How Audiences React:
Open-minded. People find characters that are similar to themselves more trustworthy and believable.

Exercises to boost independence:

1. Create a list of people who are outside of the organization that you could contact for stories

2. If you cannot think of anyone, instead write down the type of people that make up your audience. Write down who they are and who they would trust. How could you make connections with these trusted groups? (Consider using Tool #5: Audience Persona Worksheet or Tool #7: Character Supply Chain Map to determine who your audience is and the type of person they would sympathize with.)

Chapter Five: Managing Story Distribution

Objectives:

- To coordinate scheduling and platforms for superior message delivery and amplification
- To better understand which channels to use for which stories, and how to tailor them appropriately

Tools:

#14: Advocate Amplification Toolkit
Sample content and guidance to provide when equipping members and other audiences to share stories

#15: Channel Selection & Tailoring Worksheet
Worksheet to guide repurposing of stories on multiple digital channels, with explanations of key characteristics that dictate content sharing rules

#16: Channel Takeover Guide
Process and considerations for allowing members and advocates to share stories directly on the organization's social media channel

#17: Congressional Outreach Checklist
Guidance on sharing stories with Congressional offices

#14:
Advocate Amplification Toolkit

Overview

A story is only as good as its messenger, and in Washington, an effective storytelling campaign often relies on messengers besides the organization. Just as advocates, members, partners and supporters should be involved in the story collection process, so too should they be involved in the sharing process. Stories will travel further and resonate more strongly when they are shared within communities of individuals, so organizations must think strategically at the outset of a campaign about how they will build in opportunities for participation throughout. Use the following worksheets to plan for the kinds of asks you'll make, what content you'll produce to equip others to share your stories, and how you'll monitor for and respond to positive engagement.

Outcomes

- A strategic plan for amplifying stories among key stakeholders
- Ideas for story-related content to create and repurpose to encourage and recognize sharing

Estimated Completion Time: 60 minutes

Step One: Planning

A sound amplification strategy will address several key questions: 1) Who do we want to engage? 2) Why would they want to help us? And 3) When do we want this to happen?

Instructions: To answer questions 1 and 2, use the following table to brainstorm various stakeholder groups who you'd want to be involved in sharing your stories or campaigns. Think broadly—are there partner organizations that would have something to gain? Certain segments of your grassroots network that you'd like to engage further? Staff or employees of your organization you'd like to involve?

Then, identify 8-10 individuals within those groups who could serve as your early ambassadors. The idea is to engage and equip them with content first (prior to the start of the campaign), so that when the campaign begins you'll already have solid momentum and traction within each key group.

Finally, brainstorm your value proposition: what's in it for these groups? What incentives, rewards, or recognition can you offer that will make participation more appealing?

	1. Core Individual Ambassadors *Which specific people/ social users do we want to engage early to create excitement or social proof?*	**2. WIIFM?** *Why would they want to participate? What self-interests can we appeal to?*	**3. Possible Rewards & Recognition** *What can we offer in exchange for participation, that meets needs identified in #2?*
Group #1 ________________			
Group #2 ________________			
Group #3 ________________			
Group #4 ________________			
Group #5 ________________			

Step One: Planning (cont'd)

Next, think about the timing of your campaign. Do you want to create a one-time, immediate moment of engagement (e.g., to align with a convention or fly-in), or more ongoing engagement? While some of the basic tools and considerations are the same, the cadence with which you plan to roll out your content and calls-to-action (as well as the overall quantity you need) could vary significantly.

Review the pros and cons of each approach below, and select the option most suited to your current needs, campaign goals, and bandwidth.

☐ **One-Time Push**

- ✓ Easier to demonstrate immediate impact (e.g., campaign is trending)
- ✓ More captive audience of potential amplifiers (if tied to an event)
- ✓ Less time devoted to monitoring and follow-up
- ⦸ Chance that audiences may miss campaign if they're not actively paying attention that day
- ⦸ Harder to translate one-time engagement into lasting relationship (think: Ice Bucket Challenge)

☐ **Ongoing Asks**

- ✓ Potential to reach broader audience—and reach them multiple times
- ✓ Opportunities to nurture deeper relationships with amplifiers
- ✓ Can tell a more complex, nuanced story by releasing serial content
- ⦸ Hard to sustain momentum; requires bandwidth to monitor constantly, and to periodically create or share new content/calls-to-action
- ⦸ Risk of amplifier burnout if not properly rewarded/recognized

☐ **One-Time + Ongoing**

- ✓ If timed right, one-time push can re-energize an ongoing effort
- ✓ Maximizes potential audience reach
- ✓ Can cater to different amplifier segments for one-time or ongoing asks
- ⦸ Most bandwidth-intensive to plan and monitor

Step Two: Equipping

Your goal should be to make it as easy as possible for your amplifiers to share your stories. That means making a variety of content available in ready-made, platform-specific formats. The fewer the clicks, the better!

Think about the goal for each piece of content—the action you want people to take—and this will dictate how much additional information you include (e.g., campaign hashtags, URLs to campaign websites or microsites, logos/taglines, etc.).

The following is a comprehensive checklist of the types of content you can create by platform to encourage sharing. Aim to select at least a couple of options for each platform, knowing that your amplifiers are likely to have specific platforms that they are more or less likely to use, as well as different comfort levels with sharing and the norms and mechanics of each.

Step Two: Equipping (cont'd)

Email

❑ Custom email signatures
❑ Banners
❑ Icons

Facebook

❑ Text status updates with links
❑ Images, graphics or infographics
❑ Custom profile photos
❑ Timeline cover images
❑ Short videos, animations, or gifs

Twitter

❑ Tweets with links
❑ Images, graphics or infographics
❑ Custom profile images
❑ Timeline cover images
❑ Short videos, animations, or gifs

LinkedIn

❑ Sample posts with links
❑ Images, graphics or infographics
❑ Timeline cover images

Instagram

❑ Images, graphics or infographics
❑ Short videos, animations, or gifs

Events

❑ Display signage with hashtags and calls-to-action
❑ Step-and-repeats
❑ Custom photobooths

Media / Press

❑ Ad slicks / PSA scripts
❑ Customizable press releases
❑ Customizable op eds

Misc./Offline

❑ Desktop backgrounds
❑ Screensavers
❑ PowerPoint templates
❑ Posters
❑ Badges/banners for website
❑ Branded props/ tchotchkes

Creating Multiple Versions

It's a good idea to have several different versions for each piece of content you'd like people to share. For example, create one image that features a quote from a story, one image that features a statistic or data point, and one that features a tagline or slogan. The benefit of this is you can track and measure to see which creative options are performing best, and incorporate these more into current and future campaigns. Notice in the example below that the National Hospice and Palliative Care Organization gave their Twitter followers several distinct messaging and visual options—thus raising the likelihood of appealing to a greater number of potential amplifiers.

Step Two: Equipping (cont'd)

Instructions: Use the table below to brainstorm options for each platform or type of content. Try to make sure that each message is truly distinct from the others.

	Version #1 Copy	Version #2 Copy	Version #3 Copy
Sample Tweets			
Sample Facebook Posts			
Sample LinkedIn Posts			
Images / Graphics			
Other: ________ ________			
Other: ________ ________			

Step Three: Recognizing

The final step of your strategic amplification plan is one that most organizations devote little to no time to: responding and recognizing the individuals who participate and share. A little recognition can go a long way—both toward nurturing longer term relationships with your amplifiers, and toward encouraging others to begin engaging in the campaign.

Instructions: Use the prompts below to guide a team conversation and to develop your campaign monitoring and response strategy.

How do we plan to monitor for individuals who are sharing our content?

Platform: __________	*Platform:* __________	*Platform:* __________
Search terms / hashtags: __________ __________ __________	*Search terms / hashtags:* __________ __________ __________	*Search terms / hashtags:* __________ __________ __________
Frequency: (e.g., hourly, daily, weekly) __________	*Frequency: (e.g., hourly, daily, weekly)* __________	*Frequency: (e.g., hourly, daily, weekly)* __________

What kinds of platform-specific "thank you" messages can we share?

Platform: __________	*Platform:* __________
Response: __________	*Response:* __________
Platform: __________	*Platform:* __________
Response: __________	*Response:* __________

What other creative ways can we acknowledge or thank participants? (e.g., short videos, images, graphics, etc.) On what other platforms?

Examples:
- ✓ Creating a "wall-of-fame" and sharing on social or posting on website
- ✓ Sharing a "fan of the week" graphic that highlights an engaged participant
- ✓ Featuring all-star amplifiers in your newsletter or other non-social channels
- ✓ Nurturing new relationships with #followfriday shout-outs

Our Ideas:

____

____

____

____

#15: Channel Selection & Tailoring Worksheet

Overview

Centuries before stories were printed, they were passed down orally. Today, this sharing culture continues on social media, where today's storyteller has to master the many languages of social networks, from Facebook to Twitter to LinkedIn. Too often, organizations don't take the time to customize the way they share their stories across the different platforms, taking into consideration the key features and limitations of each. This can result in missed opportunities for engagement. Use the following worksheet to help you tailor and optimize your stories for the most popular social platforms. Before your post your stories, check the list of considerations and tips to make sure your content is adapted for the specific norms, expectations, and functionality of each platform.

Outcomes

- Suggestions to guide your channel selection, including tips for posting content

Estimated Completion Time: 10 - 15 minutes

Channel Selection & Content Tailoring

Instructions: Not all stories are a perfect fit on each platform. Consider how the goal of the platform —and what users typically expect from it—fits with your content. Before you post your story on each platform, use the checklists below to ensure that you are tailoring your content appropriately and maximizing your opportunities for engagement.

Facebook

Goal: Connect with Friends to Share Content

- ❑ How can this be written as a conversational status update that fits into the News Feed?
- ❑ What media can I share with this post to make it more likely to stay in the News Feed?
- ❑ Can I broadcast portions of this content live?
- ❑ Who can I tag in this media to encourage them to share? (e.g., partners, members)
- ❑ How can I post this in a way that encourages people to like, comment or share?
- ❑ Have I optimized the sizes of my media to fit Facebook's specifications?

Twitter

Goal: Surface Interesting Stories to Reach a Global Audience

- ❑ Do I have a link to a full version of my content that I can share?
- ❑ What is one piece of media I can share that summarizes this post?
- ❑ What hashtags can I use to connect this to a larger conversation?
- ❑ Who is most likely to retweet this story? Can I personalize a tweet and mention them?
- ❑ What stories are trending and how can I most relevantly link my story to these trends?
- ❑ Could I tweet portions of this story in a series to create real-time momentum?
- ❑ Have I optimized the sizes of my media to fit Twitter's specifications?

LinkedIn

Goal: Share Content within the Industry to Build Professional Reputation

- ❑ Does my headline promise to address a pressing question about a professional issue?
- ❑ What photo can I post to illustrate this headline?
- ❑ Do I have a link back to a relevant portion of my website that I can share?
- ❑ What is my plan to share this on other social media?
- ❑ Have I optimized the sizes of my media to fit LinkedIn's specifications?
- ❑ Would this make a compelling post for Pulse, or could I post it in a specific group?

Medium

Goal: Contribute New or Interesting Perspectives to Contemporary Conversations

- ❑ What information can I share in a headline and subheader that will tease my content?
- ❑ What media can I share within this post and where should it be placed in the story?
- ❑ What pull quotes should be highlighted?
- ❑ Who can I bring into the conversation through responses or comments?
- ❑ What is my plan to share this on other social media?

Channel Selection & Content Tailoring (cont'd)

Instagram

Goal: Connect Visually with Creative Types

- ❑ What are my strongest visuals?
- ❑ Can my story stand alone on the platform without external links? Or with a link in the bio?
- ❑ How can I add context in the captions?
- ❑ Could I release images in this story in a series to create real-time momentum?
- ❑ What are the hashtags, mentions, or geotags I can use to bring attention to this story?

Reddit

Goal: Generate Conversations within Concentrated but Passionate Groups

- ❑ What groups have a strong interest in this story?
- ❑ What questions can I ask to start a conversation around this content?
- ❑ How much time do I have to respond to comments and messages?
- ❑ What is my plan for responding to negative comments or feedback?

Snapchat

Goal: Link with a Younger Audience to Show Fun, Personable Content

- ❑ What can I share with visuals in 60 seconds or less?
- ❑ How can I quickly create a succession of snapshots or video to tell a story?
- ❑ How can I encourage screenshotting and sharing on other social media?
- ❑ What emoji or filters would complement these visuals?
- ❑ How can I inspire creativity or surrealism with my visuals?

#16: Channel Takeover Guide

Overview

Stories shouldn't be relegated to a webpage alone. Today, audiences discover content on social media across a variety of platforms. While most organizations are active on social media, innovative groups are experimenting with new ways to communicate and connect. It's one thing to tell someone else's story on social media; it's another to let them tell the story themselves. Recently, organizations ranging from the National Retail Federation to the Department of Labor have experimented with letting individuals take over their social media accounts, messaging as themselves but reaching a far wider audience than they would have as an individual. The takeovers put a human face on the organization and are an excellent opportunity for deeper, lengthier social media engagement. Use the following worksheets to plan and conduct a channel takeover.

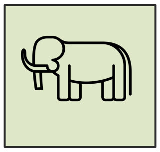
Outcomes

- A style guide and set of key messages to guide channel takeover
- A timeline for preparation and promotion
- Tips for finding the right takeover participants

Estimated Completion Time: 30 - 45 minutes for planning (time for takeover execution will vary)

Anatomy of a Takeover

What does a social media takeover look like? The example below highlights some of the key takeaways of this lesson. Please use it as a reference while working through steps one and two.

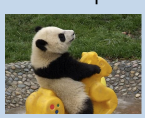


Zookeepers Association
We represent the nation's zoo animals and their caretakers.

Hi there, fellow zookeepers! My name is Abby, and last week, Zookeepers Association asked me to share more about what it's like to work with baby pandas! Hope you'll follow along #pandacare

First stop: rise and shine, it's breakfast time! Baby pandas still can't chew bamboo, so #pandacare means mixing breakfast smoothies for cubs. 🍼🐼

After breakfast, it's play time! #pandacare



So cuuuutee! What's the name of the one on the blue rocker?

That's Tommy! He's normally a little shy but he's feeling social today! #pandacare

Identity Swap
To build authenticity, consider swapping the organization's bio and photo for that of the takeover participant

Flowing Storyline
Match your story to the timeline of your platform, but give it a clear beginning, middle, and end. **Suggested formats:** a day in the life, behind the scenes, or event-based content

Authentic Voice
Your takeover host should represent your target audience and they should write the content. The ideal participant will already be active and well-versed in the takeover platform's culture.

⚠ *Do not write content for your takeover participant. They should be themselves. The organization can have final approval or disapproval, but any manipulation is dishonest and creates potential for backlash.*

Genuine Participation
The takeover should be part of a larger conversation. Listen, like, and respond to comments. Don't be afraid of tangents.

⚠ *Timing is everything, and social media moves at an accelerated pace. If each post needs approval, work out possible scenarios and responses in advance so you can reply on the fly during the takeover.*

**Note: Contrary to appearances, most social media channel takeovers are not "live." Instead, content is created and approved in advance, and then posted sequentially on the allotted date(s) and time(s).*

Step One: Preparation and Promotion

Create a Set of Key Messages

Develop five key statements that reflect the topics and attitudes of your campaign while staying true to your existing social media goals. Use the prompts below to help you get started.

- *Who is our target audience? What questions are uppermost in their minds?*
- *What's a topic we wish people discussed more? How can we start a conversation around that issue?*
- *What would be the ideal outcome for this takeover?*

1) ______________________________
2) ______________________________
3) ______________________________
4) ______________________________
5) ______________________________

Establish Takeover Structure and Format

I. Form a Timeline

Your takeover should have a definite start and end date. Consider:

1. ***Number of Posts Per Day/Hour:*** What pace fits our platform? For example, Twitter moves quickly and will require many posts a day. A platform like Instagram may only require 1-2 posts per day.

2. ***Dates of Takeover:*** What are the best dates to launch the takeover? An annual event might be a great opportunity because more members are actively checking the organization's social media.

3. ***Duration:*** How long should the takeover last?

4. ***Other Factors:*** What else do we know about time and activity on social media from analytics? When are our followers most active? Certain days of the week, or times of the day? *Don't forget that Washington in the Information Age data shows that evenings and weekends are prime times!

II. Create a Takeover Style Guide

Include the following in a style sheet you can reference when working with your takeover participant:

Voice:

My participant sounds like______________________________

They use terms like______________________________

Step One: Preparation and Promotion (cont'd)

Create a Takeover Style Guide (cont'd)

Types of posts:
The media that performs best on my platform is____________________________________

Structure:
The takeover will focus on this event____
It should start with____
And end with____
In the middle, ____should happen.

Tone:
The audience should feel____
The audience should be motivated to do____

Other:
Include other platform specific details as well, such as recommended photo filters and tags, hashtags, emoji, etc.

Find a Participant

Scenario 1 – Partner with a member organization
Scenario 2 – Partner with an individual (member or non-member)

In both scenarios, the participant should:

- ❑ Already be engaged with the organization and have an interest in continued participation
- ❑ Relate to your target audience
- ❑ Have a demonstrated ability to write and/or take photos or videos
- ❑ Be active on social media
- ❑ Align with your key messages
- ❑ Understand the time commitment and approval process

Promotion

If partnering with a member organization, promotion should be coordinated.
Time: Minimum of one month before the Takeover deadline

- ❑ Contact niche bloggers who can attract an audience outside of your typical followers; consider giving them special rights to preview content
- ❑ Notify local and national media outlets
- ❑ Give your takeover a hashtag, so it can be found on search
- ❑ Post about the takeover on your blog and other social media, including channels other than the one on which the takeover will be occurring
- ❑ Customize your web site to encourage users to visit social media, for example, let the participant "takeover" your home page or blog
- ❑ Provide a countdown or other build-up prior to the first day of the takeover

Step Two: Launching the Takeover

Content Creation and Approval Process

Time: Minimum of two weeks before the Takeover deadline

I. Formalize an Approval Process

Before anything is released on social media, create a communal space for sharing content drafts, comments and concerns.

Sample Template:

Post 1:

Text:
"Daily weigh in. We rely on tupperware to keep the pandas from squirming away. #pandacare"

Scheduled: 04/28/16 @ 11:45 a.m. EST

Comments:
JD: could we change the filter on the image from Valencia to Juno?
EB: changed to Juno
JD: much better, thanks!!

Status:
Approved by JD on 03/30

Recommended Resource: Google Doc or cloud sharing service

II. Prepare Responses for Day-of Questions and Conversations

It's important to actively engage in any conversations as they happen in real time. Before the launch of the takeover:

- ❑ Create a list of anticipated questions the takeover participant might be asked
- ❑ Have the participant pre-write responses to questions or run a practice drill to gauge how they will respond on-the-fly
- ❑ Build a reference webpage or microsite that the participant can link to for commenters who want more information

Step Two: Launching the Takeover (cont'd)

Go Live!

Time: 1 day to 1 week

Follow the guidelines below on the day of the takeover:

At the Beginning:

- ❑ Announce the takeover and introduce the participant.
- ❑ Replace the profile bio and photo with that of your participant to make it feel authentic

Throughout the Takeover:

- ❑ Monitor events on social media to make sure your content is still relevant
- ❑ Have the participant join in on conversations using prepared resources
- ❑ Continue promotion

At the Conclusion:

- ❑ Reclaim the account and thank the takeover participant
- ❑ Make any overt policy statements here, in the voice of the organization
- ❑ Link back to where the archive of the takeover will live

Step Three: Archive and Impact Report

Archive

Time: 1 day

Recommended Resource: Storify or other social archiving tool

Create an archive of the takeover, so that it doesn't disappear when your social media feed returns to the daily routine. Post this on your website or blog, so that it's easy to access later.

Impact Report

Time: 1 week

An impact report shares success metrics with your takeover participant. If It's an individual, it should be appreciative and focus on the positive impacts. If it's an organization, it should be something they can present to their board, including engagement data, analysis of top performing posts, and strategies for improvement.

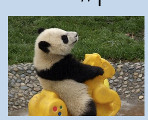
Sample Report:

Dear Abby:

Thank you for dedicating your time and creativity to this week's social media takeover. You had such an important impact on our campaign, and I hope the experience was as meaningful for you as it was for us. I wanted to share some of the feedback we received. I hope you enjoy!

Top Performing Post:

After breakfast, it's play time! #pandacare



22 Likes, 15 Shares, and 31 Comments

Our favorite response:

"@Zooworker22 Thank you for showing what it's really like to be a zookeeper! My friends and co-workers have been following along all day."

#17: Congressional Outreach Checklist

Overview

Members of Congress and their staff (particularly the oft-overlooked communications directors and press secretaries) need stories from organizations that work with and for their constituents, but these stories often don't reach them because of how they are pitched. Rather than mass emailing a database of Congressional contacts, approach your outreach the way you would with a journalist: personalized, relevant, timely, succinct, and coordinated. The following worksheet offers guidance and specific prompts to help build more effective story pitches.

Outcomes

- Personalized story "pitch" for specific Members of Congress and their staff, and a flexible template for use with other stories

Estimated Completion Time: 20 - 30 minutes

Step One: Researching Your Target

Instructions: Prior to reaching out to any Congressional staffer, make sure you know enough about his or her office's issues, priorities, and any current activities related to your story subjects. Doing your homework upfront will make it easier to craft a short (but sweet) email that is more likely to get a response than impersonal outreach attempts. Use the following prompts to lay the groundwork for an informed, strategic pitch.

❑ Does your story feature a constituent or business from the correct Congressional district or state?

Introduce the geographic connection and convey appreciation. (e.g., *"We appreciate Congressman Smith's efforts on behalf of families in Rochester and want to share a story of a family here in the city who embodies why this issue is so important."*)

____

____

____

❑ Is the issue the story illustrates one that the policymaker is personally interested in?

Summarize his/her connection to the issue in one sentence. (e.g., *"I know that Congressman Smith is a strong supporter of paid family leave, as we saw in his recent Twitter chat."*)

____

____

____

❑ Is the story timely or urgent? Is there a vote coming up, or some other tie-in to current conversations or trends?

Provide a one-sentence overview of why the story is important now. (e.g., *"With the vote coming up, I wanted to make sure you had access to stories that demonstrate just how important the Congressman's position on the issue is."*)

____

____

____

❑ Do you know the name of the staffer? Are you familiar with his/her work?

Address the email to him/her personally; add one sentence to demonstrate something else you know or appreciate about his/her recent work.

____

____

____

Step One: Researching Your Target (cont'd)

❑ Is your policy team planning to engage with the legislative staff on the same issue/campaign?

Reference any outreach that has already or will be taking place between your counterparts. (e.g., *"Our senior legislative director plans to connect with [name] to share more details about this campaign."*)

____

____

____

❑ Is there a microsite (or pdf attachment) with more information on the campaign to direct people to?

Keep details in the email to a minimum; provide a one-sentence call-to-action with a description of the kinds of specific information that can be found in the included link or attachment.

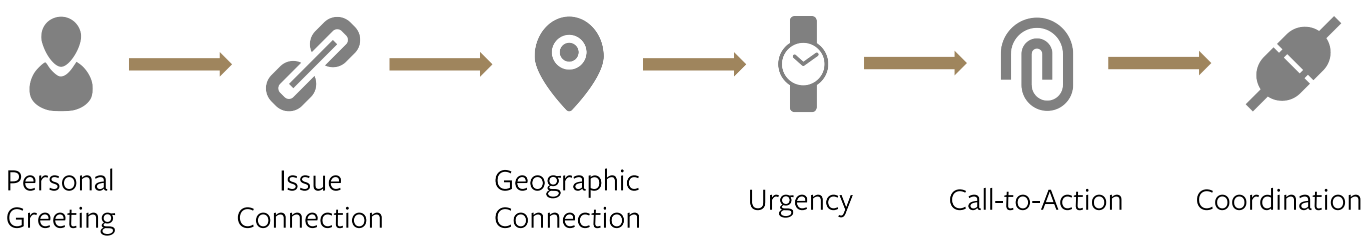
____

____

____

Step Two: Building Your Pitch

Now that you've created the building blocks of your story pitch, it's time to put them together. The formula below provides a basic template for assembling your pitch in a logical, action-oriented order.



Sample Email

Hi Dan,

Congrats on the great coverage of Congressman Smith's role in authoring the ABC bill. I know he's been a vocal supporter of paid family leave lately, and we've been collecting stories from families in his district who are greatly impacted by the current lack of policy. Given that there's a hearing coming up, I wanted to get these in your hands to share more broadly in support of the Congressman's position. The attached pdf has one great story, and more can be accessed at www.campaignmicrosite.org. My colleague from our legislative team will reach out later this week to see how our stories and data on the issue can assist Samantha on the policy side.

Sincerely,
Sarah

Chapter Six: Measuring Story Success

Objectives:

- To identify metrics that demonstrate how storytelling efforts are contributing to broader communications or organizational objectives
- To build systems for monitoring success of individual stories and campaigns

Tools:

#18: Key Indicator Selection
Worksheet to aid in selecting key metrics to gauge story success

#19: Storytelling Dashboard Template
Sample tool used to track performance across key indicators

#18: Key Indicator Selection

Overview

For many organizations, the process of measuring story success is largely anecdotal. We *know* that stories work in our guts, we may hear from members or supporters that particular stories resonated strongly with them, but often we lack the concrete proof or metrics that can back up those claims. It's the ultimate irony: we need data to prove that our stories work; stories about their success aren't enough! Indeed, the highest performing storytelling organizations in Washington have learned that arming ourselves with metrics that prove success can pave the way for further investment in storytelling efforts and elicit buy-in from colleagues across the organization. But first, we need to know what we're measuring. Use these worksheets to articulate your overall objectives for your stories, and to identify the metrics you'll track to prove success.

Outcomes

- Concrete objectives to measure story success and a framework for developing future objectives
- A template to use in constructing your storytelling dashboard

Estimated Completion Time: 45 minutes

Starting With Strong Objectives

Whether you're looking to measure the impact of an individual story on Facebook, or an entire multichannel storytelling campaign, all efforts should start with identifying and articulating your objectives. How you frame your objective will determine how success is measured, and where you look for the data.

There are many different ways to categorize communications and storytelling objectives. For the purposes of this exercise, we'll focus on a simple framework developed by KD Paine and the Institute for Public Relations*: Output, Outtake, and Outcome-based objectives.

Output Objectives focus more on activities or content generated. For example, you may wish to measure success in terms of how many stories your team has produced this quarter, how many times your storytellers have gotten requests from media or speaking engagements, or how many media hits or social media engagements your stories have generated.

Outtake Objectives are more tricky; they measure audiences' reactions to our stories. Typical outtake objectives would be structured to measure follow-through on our calls-to-action: numbers of downloads, mailing list sign-ups, or shares on social media (if that's what we asked our audience to do). They can also be structured to measure retention or satisfaction—for example, the American Institute of Architects included a question in their member survey about how members value the organization's new storytelling efforts and found that it was among the top drivers of member satisfaction.

Outcome Objectives and metrics answer the question "so what?" These are the most difficult to measure, both for individual stories and for full-fledged campaigns. Did our stories result in higher member retention? Did they influence a policymaker to vote a certain way? Often these are answered anecdotally for stories; we'll hear, for example, that a specific story led someone to donate to an organization, or that a member company now has a stronger relationship with their Congresswoman because she reached out after seeing their story in the national campaign.

On the next page, you'll find a table that will give you the opportunity to practice crafting each type of objective for a single story or campaign.

*For more, visit www.instituteforpr.org/category/research/measurement-and-evaluation

Starting With Strong Objectives (cont'd)

<u>*Instructions:*</u> Think about a current story or campaign your team is working on. Fill in the table below to generate objectives you could use to measure success of an individual story or your broader storytelling efforts. What actions do you want people to take? How will those actions contribute to broader organizational success? The prompts will ensure that your objectives are SMART: specific, measureable, attainable, relevant, and time-bound. Two examples have been filled in for you.

	1. What *What is our desired change or action?*	**2. Who** *Which target audience(s) would we like to act?*	**3. How Much** *What is the volume or amount of change or actions we're looking to achieve?*	**4. Over What** *What's our current baseline? Do we have one? If not, where can we find one?*	**5. When** *What's the timeframe in which we'd like to achieve our desired change?*
SAMPLE (*Output*)	*Increase weekly pageviews on our "stories" webpage*	*- Web visitors referred from social media*	*Increase by 50%*	*Current weekly pageviews: 55*	*Two months*
SAMPLE (*Outtake*)	*Increase mailing list sign-ups from our story campaign landing page*	*- Potential storytellers and advocates*	*Increase by 100%*	*Current sign-ups: 5/week*	*One month*
Output					
Outtake					
Outcome					

You can now begin to see how the objectives practically write themselves when you structure your thinking in this way. In example #1 above, our stated objective would be:

> *"Increase weekly 'story' pageviews among visitors referred from social media by 50% during the next two months."*

And, you can also now see how easy it is to select appropriate key indicators and metrics.

Translating Objectives to Metrics

Now that you're armed with clear objectives, you can determine which metrics you'll track and where you'll obtain the data. There are three broad categories of metrics sources we'll focus on: analytics, A/B testing, and anecdotes (yes, we consider this a metric!).

Analytics: How do our stories perform on our website, in e-newsletters, on social media, and in traditional media?

A/B Testing: How do our stories perform relative to other non-story content? How do individual story characteristics (headlines, design elements) compare?

Anecdotes: What qualitative feedback do we receive? How can we aggregate and quantify this?

Instructions: For each of the objectives you created on the previous page, brainstorm the key indicators (i.e., what you're tracking) and where you'll get those metrics from. For most output and outtake objectives, this will be obvious—it's likely stated in the objective itself. For outcome objectives, this may be harder and may require breaking down the change into several parts.

Objective	Key Indicator(s)	Source Category	Measurement Platforms
Increase weekly 'story' pageviews among visitors referred from social media by 50% during the next two months.	*Primary: Pageviews by referral source* *Secondary: clickthroughs from Facebook/Twitter*	*Analytics*	*Google Analytics* *Facebook/Twitter Insights*

#19: Storytelling Dashboard Template

Overview

The primary challenge of good story measurement today isn't collecting data points—it's making sense of those data points, finding insights, and using these to inform future storytelling strategies and approaches. Smart dashboard construction can help focus your efforts on only those metrics that matter, reducing distracting data "noise" and honing in on patterns and relationships that can aid in optimization. It can also help with translating qualitative measurements and observations into numbers that can be used to persuade or inspire. Finally, it can measure the success not just of a single story, but of the organization's storytelling initiatives as a whole.

Outcomes

- A set of questions to drive insight development and optimization
- A template to use in constructing your storytelling dashboard

Estimated Completion Time: 30 minutes

Choosing What to Track

Your story dashboard can track many metrics at once, combining the best elements of an editorial calendar, and audit tool, a diversity planner, and a measurement tool. The more categories you choose to include in your dashboard, the more relationships and patterns you may be able to recognize both within and across these categories.

Instructions: Begin constructing your dashboard by choosing 3-5 metrics or characteristics from each of the functional categories below.

Editorial Calendar

- ❑ Publication date
- ❑ Author
- ❑ Theme/issue
- ❑ Audience persona
- ❑ Shelf life (e.g., topical, evergreen)
- ❑ Headline(s) used to share on social
- ❑ Other: ____________________

Diversity Planner

- ❑ Hero / character type
- ❑ Character demographics
- ❑ Format (e.g., text, video)
- ❑ Story type (e.g., industry impact, why an issue needs a solution, etc.)
- ❑ Call-to-action
- ❑ Plot devices (e.g., linear, non-linear)
- ❑ Other: ____________________

Audit Tool

- ❑ Findability / accessibility (e.g., is our story easy to find?)
- ❑ Strength of hook
- ❑ Relatability of character(s)
- ❑ Emotional resonance / details
- ❑ Hero-centric (vs. organization-centric)
- ❑ Strength of plot (e.g., does something happen in our story?)
- ❑ Quality of call-to-action
- ❑ Other: ____________________

(*Qualitative assessments; assign an appropriate scale, like 1-5*)

Measurement Tool

- ❑ Pageviews
- ❑ Time on site
- ❑ Bounce rate
- ❑ Open rate
- ❑ Clickthroughs
- ❑ Likes
- ❑ Comments
- ❑ Shares / RTs
- ❑ Conversions or actions (e.g., downloads, mailing list sign-ups, petition signatures, donations)
- ❑ Other: ____________________

Asking the Right Questions

Next, think of some of the broader questions you're hoping to answer through the collection and interpretation of your data. Are you hoping to learn more about the rhythms with which your team produces stories, and how this impacts engagement? Or, perhaps to identify opportunities for skill-building if you notice aggregate deficiencies in certain qualitative story ratings?

Asking the Right Questions (cont'd)

Sample Questions:
How many stories are we creating?
Are we focusing too much on any one call-to-action, theme, hero, or format?
Which stories score high/low on specific factors?
What impacts do various story characteristics have on shares, clicks, etc.?
What characteristics do our highest performing stories have in common?
Which factors are worth replicating?

Key Questions for Our Organization:

Use these questions to pressure test the metrics you chose in step one. Are you tracking the right data to get the answers you want? If not, return to the previous page and select additional metrics.

Constructing Your Dashboard

Finally, plug your desired metrics into a simple spreadsheet (a collaborative tool like Google Drive might be helpful if there are multiple data owners). The example below shows how one might assemble the categories into a logical format. Data can be updated monthly, or more frequently if you are in the middle of a story-centric campaign and wish to act on the insights more quickly.

Illustrative

	A	B	C	D	E	F
1	**Month:**			**OCTOBER**		
2	**Week:**	28-Sep	5-Oct	12-Oct	19-Oct	26-Oct
3	**Story Title:**	*John's Journey*	*Why Jane Got Involved*			
4	**Hero:**	Client	Volunteer			
5	**Call-to-Action:**	Donate	Volunteer			
6	**Format:**	Text, photos	Video			
7	**Findability (1-5):**	4	5			
8	**Plot (1-5):**	3	2			
9	**Hook (1-5):**	2	2			
10	**Hero-centric (1-5):**	3	4			
11	**Pageviews per week:**	52	35			
12	**Time on Site:**	1:30	2:00			
13	**Donations:**	1	0			
14	**E-news clicks:**	25	20			
15	**Shared on Fbook:**	3	1			
16	**Facebook Likes:**	11	7			
17	**Facebook Shares:**	5	4			

To help plan or measure story diversity

To assess story characteristics

To measure KPIs

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Research Team

Julie Dixon
Sarah Harkins
Evan Beck

For further information on topics covered in this research, findings, methodology and/or materials, please contact any member of our staff at 202-266-7900.

Follow us on Twitter
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Contact us at
communicationscouncil@nationaljournal.com

The Watergate
600 New Hampshire Ave. N.W.
Washington, DC 20037

www.nationaljournal.com