

PLANNING TO WIN™

The Just Enough Guide for Campaigners Worksheet

SIX STAGES TO A ROCK SOLID CAMPAIGN PLAN



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Using This Worksheet

As you use the **Planning to Win** companion printed guide, look for this icon on the referenced page number to identify where you can find more information and examples for that step.



Defining the Victory

Overarching Goal See **Page 8** in your guide

As you think about your campaign and what you want to achieve, what is your long-term goal(s)?

Planning Team See **Page 6** in your guide

Do you have your planning team in place? If so, list them here. Be sure to include your Campaign Leadership, Hard Truth Squad, Input Givers, Buy-in Providers and Doers.

Campaign Win See **Page 9** in your guide (or Page 10 if using the Paths to a Campaign Win exercise)

What is your campaign win? Make sure the definition of your win is specific and actionable. Not sure what campaign win to pursue? Use the **Paths to a Campaign Win** tool to help you think through the win that will work best for you.

Paths to a Campaign Win See **Page 9** in your guide

If you need help deciding what type of campaign will best fit your needs, think about what the goal you want to reach and identify the paths you could take to achieve it.

List them below:

Then, determine which path to a win is most likely to result in success by answering the following questions:

1. Which path is ripest and ready to move?
2. If a path has previously not succeeded, can you clearly identify why you think you can win now?
3. Are there clear milestones that will build momentum?
4. Which path has the fewest complications and assumptions?
5. Which path are you best suited to take on?
6. Are you prepared for the ramifications of a loss?

Once you've reviewed the questions, go back and enter your **Campaign Win**.

Note: As you think about your outreach efforts, be mindful of the line between advocacy and lobbying. Check out www.planningtowin.org for more information on lobbying restrictions.



Evaluating the Campaign Climate

What's Working in Your Favor? What Do You Need to Overcome?

Use the core questions below to assess your campaign climate. See [Page 11](#) in your guide

1. What is the state of your issue?

2. What are the top messages conveyed by those talking about your issue—both for and against? It's important to understand the current conversation around your issue.

3. What is the climate around your issue?

4. How much opposition are you facing? Who is the opposition, and how much do you know about them?

5. Who else is working on this issue? Is it a crowded field, or do you have plenty of room to gain traction? What are the biggest factors that will make you stand out?

6. What current events or opportunities can you use to your advantage?

**7. When looking at your organization or coalition, what's its reputation around this issue?
Who else should you invite to the table to maximize your ability to succeed?**

8. What connections do you have with important leaders or influencers?

9. How large are your mobilizing networks?

10. What resources are available for the campaign?

11. What other context do you need to keep front and center as you plan?

Review everything you just listed. Anything you would add? Remove?

Maximizing Strengths, Minimizing Vulnerabilities

Note your strengths and how you might want to factor them into your campaign planning to make the most of your capabilities and resources. See [Page 13](#) in your guide

List where your campaign might be vulnerable and why.

Analyze

Write down how you can minimize or eliminate the vulnerabilities you listed.

Final Assessment See **Page 14** in your guide

After you've completed your campaign climate, review the campaign win you chose. Is the win you envisioned achievable? Use the checklist below to assess your campaign win using the following questions:

Is now the right time for this campaign? ☐ **YES** ☐ **NO**

It's not enough to just say that it's urgent — what else about the timing is right?

What does your organization or coalition have that makes you best suited to lead this campaign? Is your organization the right group? ☐ **YES** ☐ **NO**

Can you win? ☐ **YES** ☐ **NO**

If not, is there a way to redefine victory to set you up for progress?

Tip: Be sure you have clear, credible reasons for why you think you can succeed.

Can you handle the risks involved? Can your organization's reputation, strategic positioning, resources and relationships stand up to the risks inherent to any campaign? ☐ **YES** ☐ **NO**

If any are checked "NO"

Refine your campaign win before moving ahead. Use the research you just completed to explore other paths. Lean on your planning team for help.

If all are checked "YES"

Congratulations! You have a smart campaign win and are one step closer to success.



Charting Your Course

Milestones See Page 16 in your guide

List up to 10 milestones you need to reach your campaign win.

Remember: Some milestones may run simultaneously, whereas others are sequential. To ensure everything is in the right order, look at the list of milestones and ask yourself what must happen before you can begin working toward each milestone. Then rank them in order using the boxes and make sure they flow in a sequence that makes sense.

Rank

Milestone

Rank

Milestone



Choosing Your Influence Strategy

Decision Makers See Page 17 in your guide

Pick one milestone to focus on for this section. Now fill in your decision maker(s), for that milestone.

Tip: If you're struggling to define a decision maker target, start by writing down all possible targets. Narrow the list by applying the following filters:

- Who has the most power over whether you reach your milestone?
- With whom do you have direct relationships, or whom can you contact easily through others already in your network?
- With whom do you have the most credibility?

Influence Strategy See Page 17 in your guide

Summarize your answers to the following questions below.

- **What would trigger a decision on this issue and why?**
- **What conditions and factors are your decision makers considering?**
- **Who do they listen to?**

Influencers See Page 18 in your guide

Who has the ability to influence your decision makers? If you have a long list of possible influencers, write them all down them below. Then, star those which are the best match when answering the following questions:

- **Who has the most influence over your decision makers?**
- **Who is most ready to take action?**
- **Who is the easiest for you to reach and activate?**

Major Tactics See Page 20 in your guide

What are the major campaign tactics that will mobilize your decision makers to take action?

Campaign Launch See Page 22 in your guide

What is the right time to launch your campaign? Do you want your campaign to: Make a big splash? Work behind the scenes? Start out quiet and go public later? Note any details below:

Tip: You can repeat this for each milestone or go to planningtowin.org to download templates that will help you complete your final plan or management chart.



Messaging for Impact

Message Visibility See Page 24 in your guide

Look back at the decisions you made in the previous steps about who and what is most likely to influence your decision makers, then check which type of profile is best for your campaign:

☐ Public ☐ Behind the Scenes ☐ Other: _____

Message Platform

What is the message platform that will provide you, your spokespeople, your allies or partners, and your organization's leadership with an overarching positioning statement?

1. The Need or Opportunity. This message point explains the problem/need that currently exists or the situation that you are working to change as a result of the campaign.

2. What We Are Doing. This message point delineates what the campaign is working to accomplish.

3. How to Do It. This message point describes how you recommend addressing the need or problem, with specific actions or steps that your decision makers need to take.

4. Vision. This message point explains the result that a campaign victory will bring about and what it will do to solve the problem or fill the need you noted at the start.

Other Campaign Signals See Page 28 in your guide

When thinking about these more subtle signals, consider the following, then write down any other campaign signals that you want to include in your campaign plan.

- What value do you want to convey?
- Are you going to be for something or against something?
- Are you aggressive or reassuring?

Campaign Name See Page 29 in your guide

What are some possible campaign names?



Managing the Campaign

Master Strategy Chart See Page 30 in your guide

Look back at the milestone you chose for your decision maker stage. Then, list out all the activities you chose for that milestone in the left column and fill out the corresponding fields:

Activity	Assignment	Timeline and Deadline	Metrics	Budget or Resources

Tip: You can repeat this for each milestone or go to planningtowin.org to download templates that will help you complete your final plan or management chart.

Tracking and Celebrating Progress See Page 31 in your guide

It is vital to take regular stock of your campaign; don't wait till the end. Review the metrics you outlined on the previous page, note deficiencies and use them to make midcourse corrections. Whenever possible, find opportunities to keep your campaign and your coalition motivated.

What is your plan for tracking progress?

How will you celebrate small victories and keep morale strong through the course of the campaign?
