

Casey Clark
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 @caseyleeclark  www.memberloyaltyindex.com

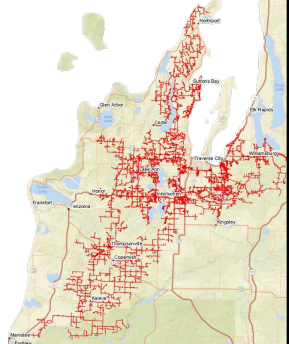
Rachel Johnson
CEO, Cherryland Electric Cooperative
rjohnson@cherrylandelectric.coop

 @RachelOnEnergy  Coop Energy Talk  www.memberloyaltyindex.com

1





about Cherryland

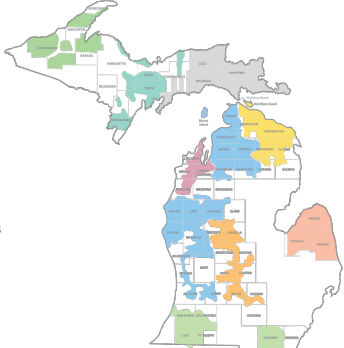
-  40,000 members
-  3,400 miles of line
-  62 employees
-  1,400 square-mile service territory
-  Serve six counties



2

about MECA & Wolverine

-  6 Distribution Co-ops
-  1,600 miles of line
-  300,000 Member Consumers
-  1,360 MW of power




3



Mentimeter

4

today's agenda



- Strategic Communications**
What is it and why do you need a plan for it?
- Strategic Communications Framework**
Your guide to analyzing where you are and planning for where you want to be.

5

today's agenda

- Situational Analysis**
- Goal Setting**
- Action Plan**
- Metrics**

Case Study: Northern Lights Cooperative
Putting the Framework to Work

6

7

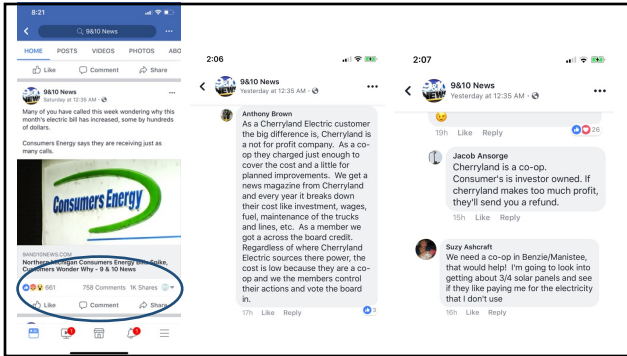
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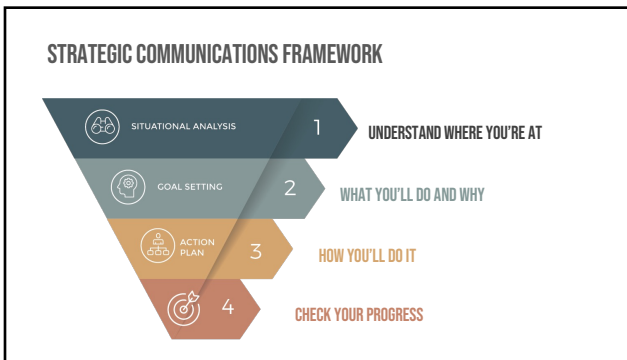
12



13

TACTICAL VS STRATEGIC COMMUNICATION	
TACTICAL	STRATEGIC
Focuses on OUTPUTS	Focuses on OUTCOMES
Sees communication as an end in itself	Sees communication as a means to an end
Aims to raise awareness	Aims to change attitudes and behaviors
Measures success by levels of awareness and satisfaction with channels	Measures success by achievement of business objective
Helps communicators be seen as producers and service providers, who can be brought in once business decisions have been made	Helps communicators be perceived as business people and problem solvers, who should be involved from the start

14



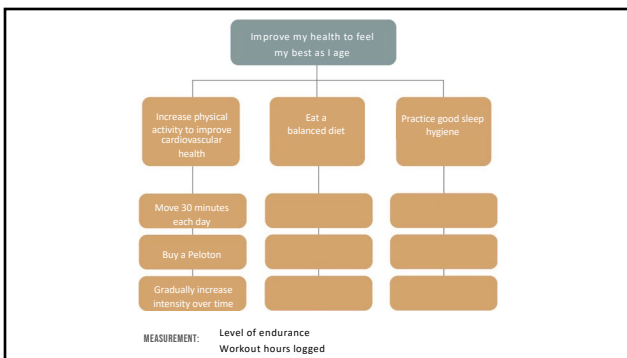
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STRATEGIC COMMUNICATIONS PLAN TEMPLATES

Download >

Download >

16



17

EXAMPLE

GOAL:
Improve my health to feel my best as I age

Strategic Objective

Increase physical activity to improve cardiovascular health
 🕒 Q4 2023

TACTICS

Move 30 minutes a day

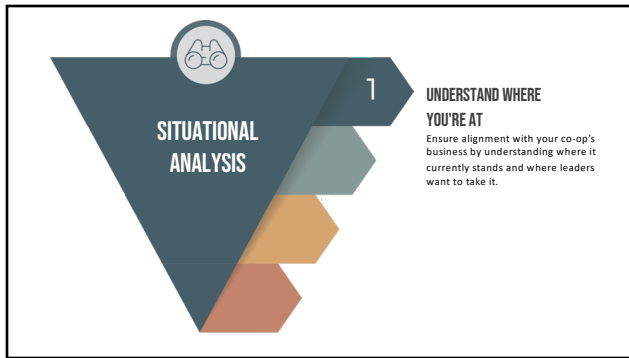
 Gradually increase intensity and duration over time

 Buy a Peloton

MEASUREMENT

Level of endurance
 Workout hours logged

18



SITUATIONAL ANALYSIS

1

UNDERSTAND WHERE YOU'RE AT

Ensure alignment with your co-op's business by understanding where it currently stands and where leaders want to take it.

19



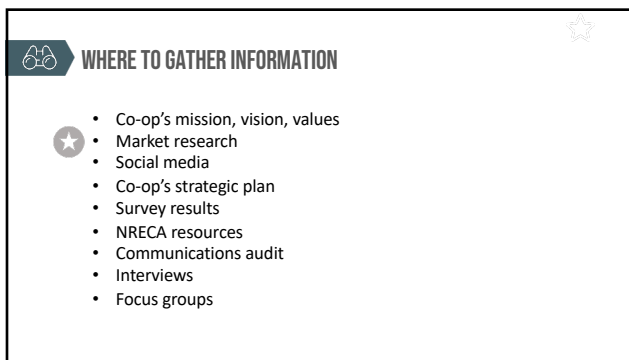
ACTIVITY:

Where to gather information?

In groups, brainstorm what resources you can review to inform your research.

8

20



WHERE TO GATHER INFORMATION

- Co-op's mission, vision, values
- Market research
- Social media
- Co-op's strategic plan
- Survey results
- NRECA resources
- Communications audit
- Interviews
- Focus groups

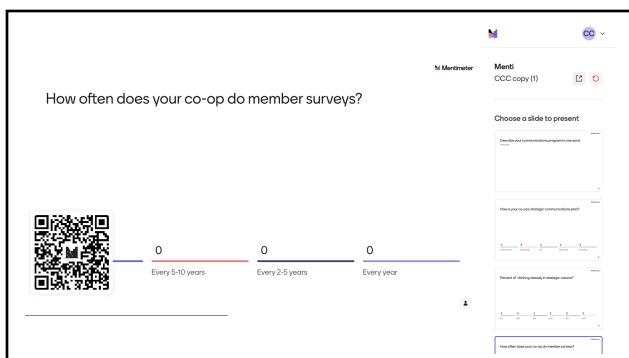
21



INTERVIEWS

- Internal department leaders
- Co-op communications teams
- Board of Directors
- CEOs
- Employees

22



How often does your co-op do member surveys?

0 Every 5-10 years 0 Every 2-5 years 0 Every year

23



SURVEYS

How to get the most out of your survey

Ask open ended questions

Analyze by groups
(demographics/psychographics/behavior)

24



THE POWER OF OPEN ENDED QUESTIONS

Neglecting open ended questions can leave valuable info out

LIKERT/MULTIPLE CHOICE

Our Company keeps employees well informed
1 2 3 4 5 6

VS

OPEN ENDED

What can we do to improve internal communications at Wolverine?

Use service center TVs for scrolling news and stretching videos

25



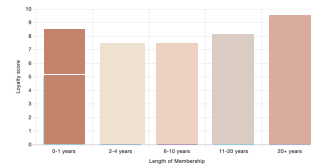
THE POWER OF ANALYZING BY GROUPS

Analyzing by group provides you with more actionable data

MLI=80

VS

MLI=90



26



SWOT

What are you proud of?
(internal)

S
O

What are you challenged by
(internal)

What keeps you up at night?
(external)

W
T

What promising things are
coming your way?
(external)

27



ACTIVITY: Situational Analysis

9

Using your notes from the case study,
complete a SWOT in your group for Northern
Lights Electric Cooperative.

S
O

W
T

28



GOAL SETTING

2

WHAT YOU'LL DO AND WHY
What business result are you
looking for? What's the goal for
your communications?

29



WHAT IS A GOAL?



A broad **primary outcome**.
Provides structure around how
communications can help your co-op
achieve its organizational goals.

Include 3-5 goals in your strategic plan

30

HOW TO WRITE GOALS



CONNECT TO THE WHY
Your goals should reflect the insights gained from your situational analysis. Link the goal to your cooperative's strategic priorities.



KEEP IT SHORT
Aim for no longer than 10 words.



FOCUS ON STATE CHANGE
Focus on where you are and where you need to go. What state change needs to happen?

31

EXAMPLE

GOAL FORMULA

State Change + who, why or how

Improve governance practices
through increased transparency and
engagement.

32

TIP: USE STATE CHANGE VERBS

- Increase
- Improve
- Build
- Foster
- Enhance
- Strengthen

33

TIP: COMMON COMMUNICATION GOAL CATEGORIES

1

REPUTATION MANAGEMENT
Identity and perception of the cooperative

2

RELATIONSHIP MANAGEMENT
How the cooperative connects with its stakeholders

3

RESOURCE MANAGEMENT
How the cooperative uses its communication resources

34

ACTIVITY: BRAINSTORM Goals

In groups, let's brainstorm as many goals as we can for Northern Lights Electric Cooperative.

State Change + who, why or how

Improve governance practices
through increased transparency and engagement

11

35

PRIORITIZING GOALS

When deciding which goals to focus on, plot the two questions below on 1-10 scales.

- How important is this goal to the co-op?
- How successful are we today at achieving this goal?

NON-CRITICAL:
Remove from vision

CRITICAL:
Maintain

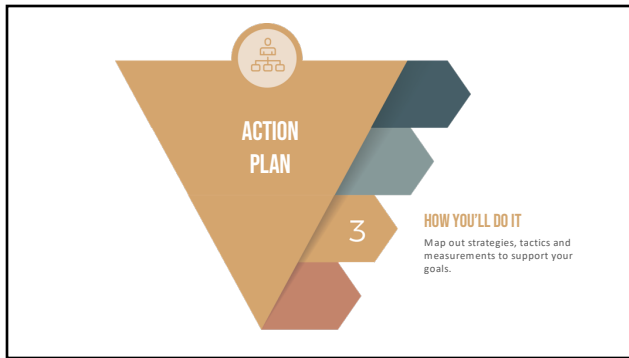
DECISION:
Improve value and performance or abandon

CRITICAL:
Improve

Success ↑

Importance →

36



37



38

WHAT IS A STRATEGIC OBJECTIVE?

Strategic objectives are an **approach** you take to achieve a goal. They represent what you want to **accomplish**. They are reasonably high level but should have a deadline attached.

Include 3-5 per goal in your strategic plan

39

HOW TO WRITE A STRATEGIC OBJECTIVE

KEEP IT SIMPLE
They should be easy to remember and understandable by everyone in your co-op.

ONE SENTENCE
Aim for no longer than one sentence.

FORMULA
Action + Detail + Deadline

40

EXAMPLE

STRATEGIC OBJECTIVE FORMULA

★ **Action + Detail + Deadline**

Increase awareness of board business among co-op members by July 2023.

41

STRATEGIC OBJECTIVE EXAMPLES

GOAL: Improve co-op governance practices through increased transparency and engagement

Strategic Objectives	
➤ Increase awareness of board business among co-op members within 1 year	🕒 2Q 2023
➤ Increase participation in board elections by 10% within 2 years.	🕒 4Q 2024
➤ Generate interest in board leadership from a diverse set of members within 2 years	🕒 4Q 2024

42



TIP: USE RESULT VERBS

- Achieve
- Acquire
- Attain
- Complete
- Decrease
- Increase
- Maximize
- Reduce

43



WHAT IS A TACTIC?



A tactic is much more **specific** than the strategic objective it links to, and it clearly **details** what you will do to achieve the strategic objective.

44



HOW TO WRITE A TACTIC



STATE ACTION
State what action
you are going to
take.

45



TACTIC EXAMPLES



GOAL: Improve governance practices through increased transparency and engagement

Strategic Objective #1	Time Period
<ul style="list-style-type: none"> ➤ Increase awareness of board business among co-op members within 1 year 	<ul style="list-style-type: none"> 🕒 2Q 2023
TACTICS <ul style="list-style-type: none"> ➤ Add "four Board in Action" section to monthly magazine ➤ Publish quarterly podcasts with board members/board president ➤ Create governance center on website with information about board meeting content, board members and other pertinent governance issues. 	

46



EVALUATE RESULTS

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CHECK YOUR PROGRESS

Constantly monitor and track your results to understand if you are achieving your goals.

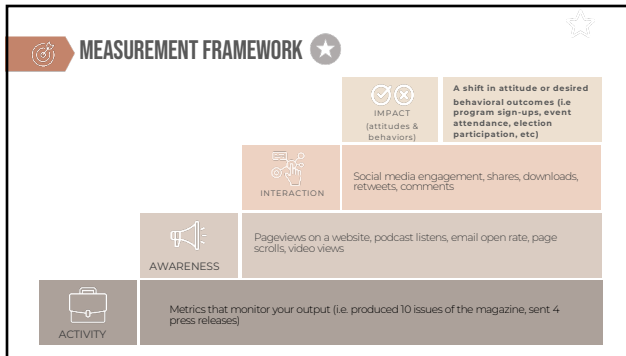
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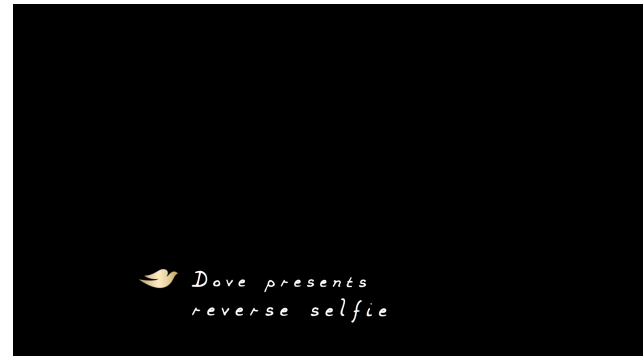
WHAT IS A METRIC?

A metric is how you **track progress** toward your goal.

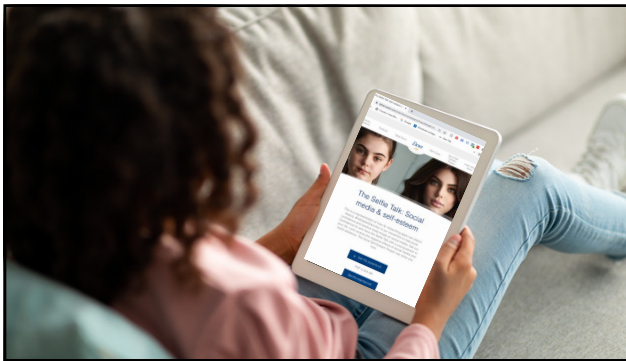
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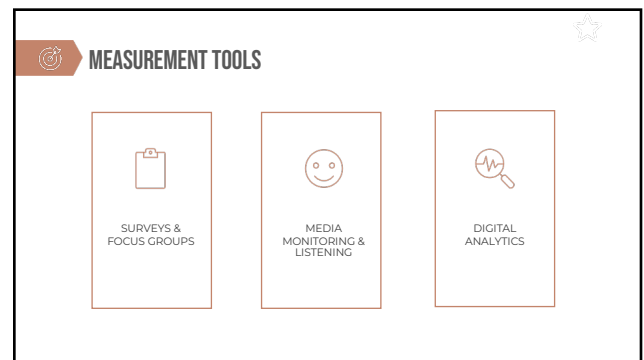
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50



51



52

REPORTING & TRACKING: UTMS

<https://voicesforcooperativepower.com/michigan>

https://voicesforcooperativepower.com/michigan/?utm_source=newletter&utm_medium=email&utm_campaign=vcp-gle&utm_content=20220606

USE GOOGLE UTM BUILDER

53

REPORTING & TRACKING: UTMS

Source / Medium	AWARENESS			INTERACTION			ATTITUDE & BEHAVIOR	
	Users	New Users	Sessions	Source Rate	Pages / Session	Avg. Session Duration	Letter Sent (Step 1 Completion Rate)	Letter Sent (Step 1 Completions)
	1,810 (8.11%) (22,205)	1,784 (8.06%) (22,285)	2,012 (9.47%) (22,975)	52.14% (24.14%) (25.2%)	1.15 (0.96) (1.23)	00:01:15 (10.12%) (10.4%)	25.75% (22.44%) (26.4%)	518 (8.54%) (8,985)
1. newsletter / email	1,419 (78.09%)	1,401 (78.02%)	1,563 (78.69%)	43.71%	1.17	00:01:27	31.02%	491 (84.79%)
2. el-foro / ad	242 (13.36%)	241 (13.31%)	246 (12.22%)	99.19%	1.00	00:00:01	0.00%	0 (0.00%)
3. facebook / social	144 (7.93%)	134 (7.51%)	163 (8.19%)	62.58%	1.17	00:00:43	13.50%	22 (4.23%)
4. offline / postcard	10 (0.55%)	7 (0.39%)	16 (0.80%)	50.00%	1.25	00:05:24	31.25%	5 (0.87%)
5. 480sk / social	1 (0.06%)	1 (0.06%)	4 (0.20%)	75.00%	1.25	00:02:39	0.00%	0 (0.00%)

54

PICKING YOUR METRIC(S)

Choose 1-3 key metrics per goal

- Quantify goal if can (often you can't)
- Quantify strategic objective if can
- Tactics easiest to measure

55

EXAMPLE



GOAL

Improve co-op governance practices through increased transparency and engagement

Strategic Objective

- Increase awareness of board business among co-op members within 1 year

2Q 2023

TACTICS

- Add "Your Board in Action" section to monthly magazine
- Publish quarterly podcasts with board members/board president
- Create governance center on website with information about board meeting content, board members and other pertinent governance issues.

MEASUREMENT

- Visits to governance page of website
- Number of podcast listens
- Increase scores on board awareness survey questions

56

GOAL ASSIGNMENTS

1. Improve onboarding process to build relationships and increase engagement with new members
2. Improve cooperative culture through enhanced internal communications
3. Improve outage communications to meet evolving member expectations
4. Increase adoption of electric vehicles in service territory to support load growth
5. Establish reputation as a trusted energy advisor through owned, earned and shared media
6. Grow awareness and participation in co-op member-facing programs to strengthen member engagement

57

ACTIVITY: Complete action plan and metrics

In groups identify
strategic objectives,
tactics and metrics for
your assigned goal.

18 or 22

58

CHAT GPT AS A BRAINSTORMING PARTNER



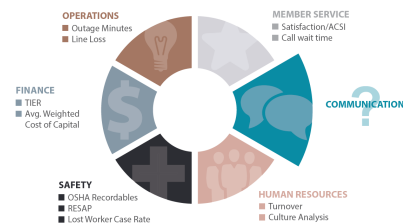
Prompt

You are an expert on strategic planning for electric cooperatives and electric utilities, especially strategic communications. Write me three strategic objectives to support this communications goal: *insert goal*

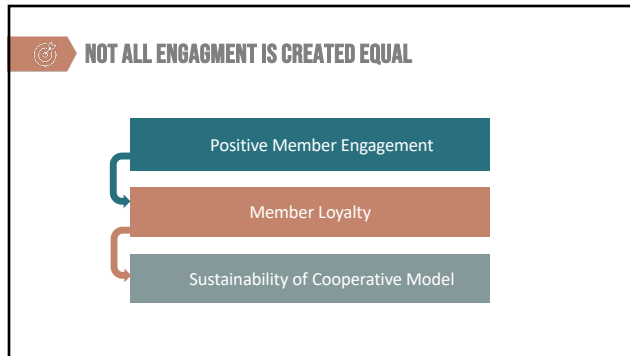
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KEY PERFORMANCE INDICATORS

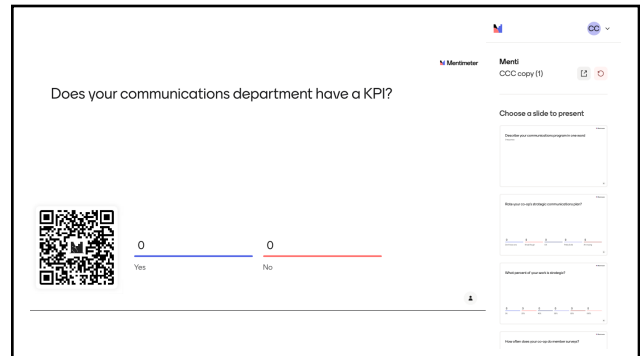
Likely to be benchmarked over several years



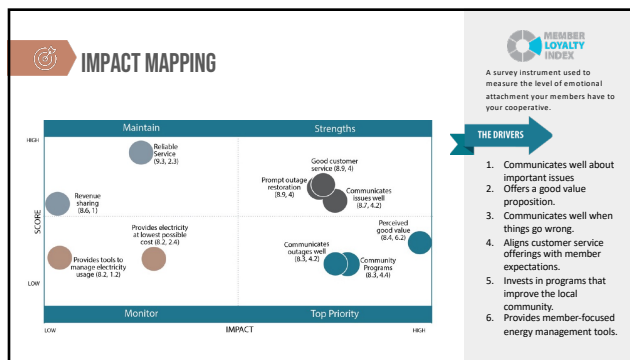
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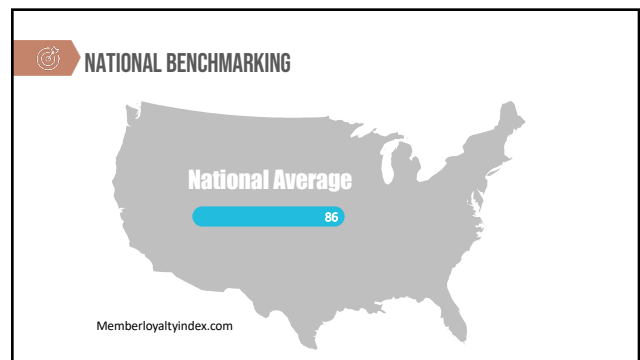
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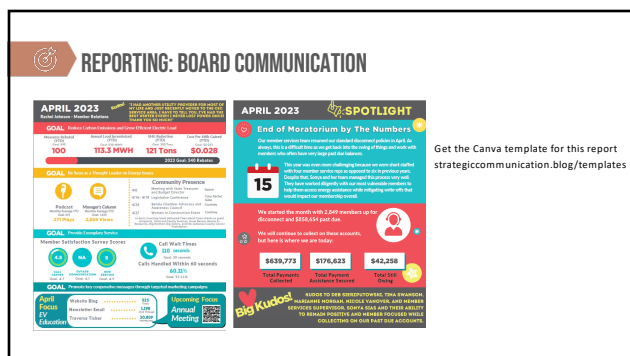
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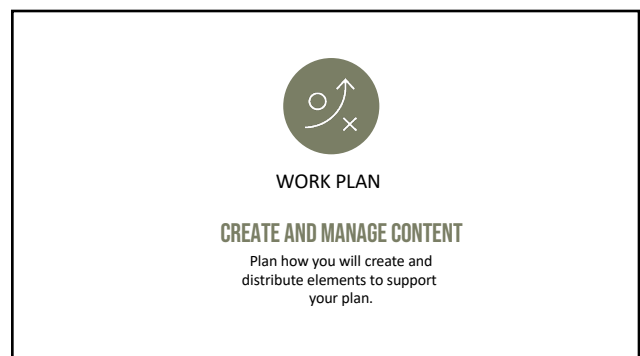
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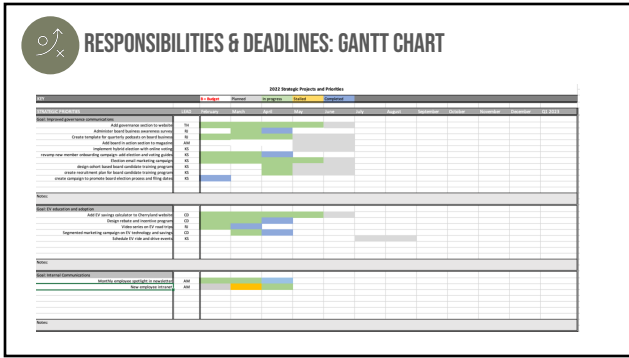
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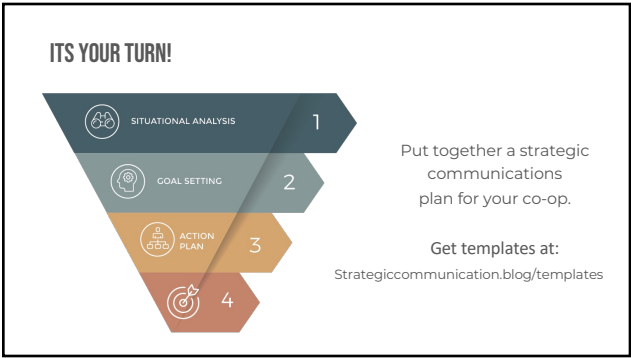
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67



68