

Campaign Planning: Goals, Strategies, Tactics

You and your team have crafted some amazing SMART goals for your campaign. Now what? It's time to translate your goals into action and big wins!

Use the following table to flesh out your next steps. For each of your short-term and interim goals, identify the strategies and tactics that you will employ to get there.

Each action item should have an “owner,” someone who is responsible for making it happen, and a concrete deadline. If you need to, plan backwards from important dates—hearings, meetings, votes, etc.—to make sure you're on track.

How to use this handout

This worksheet should be completed with your campaign team. A few recommendations to make your discussion session a success:

- **Set aside a good chunk of time**, around 60-90 minutes, so that the discussion is not rushed.
- **Gather together as many team members as possible** – people who care about the issue and are ready to invest in the campaign. *A good resource is [Doodle](#), a free online scheduling tool.*
- **Follow good meeting practices and etiquette.** Set some ground rules for the discussion, and make sure everyone has a chance to express their views.

Keep in mind: the best planning effort is not a “solo” endeavor, but involves a group of people who are committed to the goals of the campaign and who have a key role in the campaign's success. If your team can successfully answer the key questions in this handout, you're already on your way to achieving a “big win”!

This handout is adapted from the Great Communities Toolkit. To see the original version and other helpful materials from the Great Communities Collaborative, visit:
<http://www.greatcommunities.org/toolkit/>

Goals, Strategies, & Tactics

Your campaign plan should include a campaign goal and then interim goals, strategies and tactics that will lead to achieving the campaign goal. The table below can be used to help layout the campaign plan by identifying your goals, strategies and tactics.

Goals are the measurable outcomes of a campaign; there is the overall campaign goal (your “big win”) and there are interim goals along the way.

Strategies are the methods of obtaining your goals.

Tactics include all activities, big and small, used to implement the strategy.

When possible, use **numeric** goals for specific strategies and assign people and deadlines to tactics. One goal may have multiple strategies and one strategy may have multiple tactics.

Decide on your main strategies by considering the strengths in your organization and/or campaign coalition. Don’t forget to take into account your **allies, opponents, and targets**. Finally, don’t be afraid to be creative!

Goals	Strategies	Tactics	Owner	Deadline
Ex. (#) people attend community meeting for Station Area Plan	Mobilize our base	<ul style="list-style-type: none"> • Send letter to members • Call members to give info, gauge interest • Provide members with talking points • Call/email prior to meeting to remind them 	Tom	12/15/13 (Send letters one month before meeting; call two weeks and week before meeting)
	Mobilize people living in or near station area	<ul style="list-style-type: none"> • Canvass neighborhood with information about planning process; gather people’s info • Make presentations to neighborhood groups and collect info • Contact people before meeting and provide talking points 	Nancy, Miriam	12/01/13 (Canvass six weeks before; contact week before meeting)

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