Creating Engaging Campaigns

01

System mapping and theory of change

02

Audience understanding

03

Storytelling

04

Supporter journey and meaningful engagement opportunities

GREENPEACE

Credits

ABOUT

This is a handbook for change makers, campaigners and activists. The purpose of it is to help you design human centric campaigns that will create a better world.

USE AND SHARE

Use the handbook as you need, adapt to your own campaign and share it widely with as many people as you want within the movement and beyond.

CONTACT

For any question, feedback or suggestion, you can contact us writing to:
➜ **supporter.services.int@greenpeace.org**
We would also love to see examples and photos from anything you do!

AUTHORS

This guideline has been developed by the Engagement Support Team from Greenpeace International, with deep contributions fromJoe White, Michael Parker, Paula Collet and Rakel Muñoz.

The layout and illustrations have been produced by FreePress Coop.

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Contents

Creating Engaging Campaigns

Pollution and destruction of the earth's ocean, land, air and fresh water threaten our world's ability to nurture life. Now more than ever, activists and campaigners must take the lead and drive change for peace, justice and sustainability.

That means embracing complexity in a fast-changing world. Telling stories that inspire people to act in great numbers. Creating rich and varied opportunities for people to use their power to re-shape the world.

This handbook is a tool for anyone to create strategy-driven, impact-focused campaigns with the power of people at their heart. That includes change makers, local campaigners, staff at international organizations and members of grassroots movements.

The strongest campaigns take an open, democratic and participative approach right from the start. So bring your people together. Facilitate a process to create your campaign that gives everyone an equal chance to be heard. Make sure your people are diverse too, with different backgrounds and life experiences. Multiple viewpoints are a strength.

You'll find 4 modules in this handbook. Each module will help you run digital or face-to-face workshops to plan and design the key elements of your world-changing campaign. There is a slide deck and one or more workshop templates for each module.

1
System mapping and Theory of Change
Plan and design a robust campaign strategy grounded in reality.

2
Audience understanding
Evaluate and decide which groups in society have power to help win this campaign.

3
Storytelling
Create a powerful story for your campaign that will motivate your audience.

4
Supporter journey and meaningful engagement opportunities
Design a series of impactful actions to inspire your audience.

You can use this handbook in any way you find helpful. The modules have been designed to be followed in a linear fashion, starting with strategy and ending with idea generation for activities and tactics. The four modules could form the structure for four focused days of campaign work, in a face-to-face meeting or virtual retreat.

But your campaign planning and design process may look very different, be iterative or more complex. The modules and workshops are flexible and you should adapt them as you need, for example, running them across several weeks.

We wish you all the best in your campaign. We'd love to receive feedback on the material and pictures or updates about the impact of your campaign. Remember, if it's not fun it's not sustainable. So find ways to enjoy working together to co-create a fantastic campaign to change the world.

We'd love to receive feedback on the material and pictures or updates about the impact of your campaign, write us to: supporter.services.int@greenpeace.org

1 System mapping and Theory of Change

1 System mapping and Theory of Change
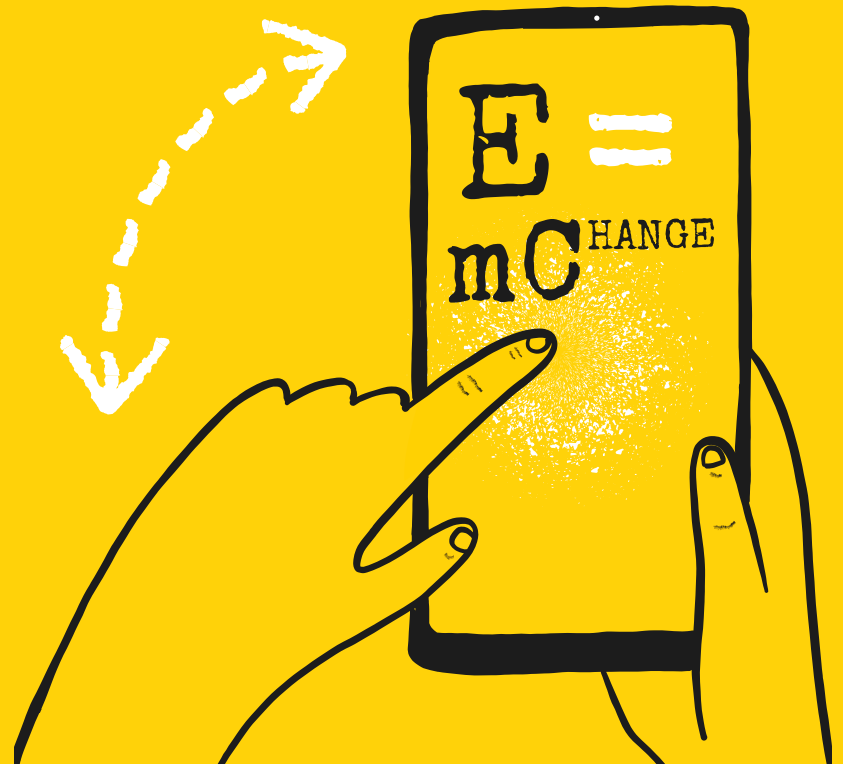
A campaign starts because we know something needs to change. A crisis must be averted, a better vision for the world realized. That's the right place to start. But how do you get from where you are now to your vision becoming reality?

As Simon Sinek says, vision is a destination - a fixed point toward which we focus our efforts. Strategy is a route, an adaptable path to get us where we want to go.

Of course, unexpected things will happen. But a strong campaign strategy will provide direction and a roadmap. The thinking that goes into it will ensure you're well prepared to be flexible and reactive.

A clear campaign strategy sets out the steps to take to reach your vision. First you need to understand the problem and the root causes that drive it. You need to know what needs to change, who has the power to make decisions about it and what groups in society hold the potential for people power that could influence them. A useful approach is 'systems mapping'.

This is an exercise to draw out the connections between people, groups, problems, opportunities or anything at all that is affected by the issue at the heart of your campaign. Your systems map could show forces that are driving the problem directly or indirectly, groups that are already working to change things, decision makers, influencers, consumers, and much more.

Systems mapping helps you take a holistic approach and see the points in the system where leverage might be applied to achieve change. You can then create a Theory of Change -- a theory that sets out how you plausibly believe change will occur from the actions of people you engage in the campaign.

To create our Theory of Change, we need to understand not just the power dynamics of the system but also the desire, motivations and power of the people we want to engage. At Greenpeace, we believe in winning individual campaigns but also in shifting mindsets and creating long-term, sustainable system change.

A Theory of Change needs to be agile, flexible and adaptable. You need to be ready to adjust if needed and to verify or reject the assumptions you originally made. So evaluate and iterate as the campaign progresses. A robust Theory of Change will allow you to design campaign activities for people that are grounded in a reasonable hypothesis for how together, you'll win the change you seek.■
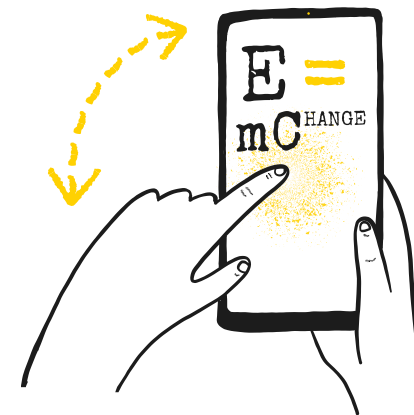
> **A vision without a strategy remains an illusion.**

Lee Bolman

Creating
Engaging
Campaigns

1
System
mapping
and Theory
of Change

1.1 System mapping

Exercise

MODULE	This session is part of Module 1: **System Mapping and Theory of Change**	
ESTIMATED DURATION	**2** Hours minimum	If you can invest more time, 4 or 5 might be also good.
LEVEL OF DIFFICULTY	**High**	An expert on the issue will be needed or at least available to support.
PARTICIPANTS, WHO SHOULD BE INCLUDED IN THE SESSION	➜ **Must have:** Core project team ➜ **Recommended:** Extended project team ➜ **Nice to have:** Local community members, volunteers, political experts.	
PREPARATION	A well defined Theory of Change (see exercise guide), detailed background information and research on the topic.	
SETTING UP THE SESSION	➜ A large sheet of flipchart paper. ➜ Markers for everyone. ➜ A large flat surface to work on.	
TEMPLATES TO PRINT & MATERIALS	There are no templates. This is a free form exercise. ➜ **Slide presentation**	

➡ Introduction to the session

Systems thinking can help us to understand complex systems by exploring how all the different parts of a system are interconnected. If we can create a holistic view of the entire system by mapping the different parts, connections may emerge that help us to better understand and influence the system.

It's great to do this using a systems mapping exercise in the core strategy planning phase of project development. It can help us understand who the key players are, how they relate to each other and what the power dynamics are.

💡 Purpose
To identify the key players that will be involved in this project. To develop a basic understanding of how the key players are interconnected in order to identify the best ways to drive systemic change.

🏆 Outcome
A list of key players for your project that are implicated in the system you want to change. You should have a basic understanding of how they are linked. You will be ready to conduct some deeper analysis to understand the complexities of these relationships and how they intersect.

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Agenda and instructions for the session (step by step)

1. Grab a large piece of paper and some markers/pens (different colors help).

2. Start by identifying what you want to explore and writing it in the center of the page. For example, "plastic in the ocean" or "Indonesian rainforest destruction".

3. Make sure everyone working on the map has a pen. Everyone should be writing at the same time, not just one person writing down what others say.

4. Start to throw down everything that relates to the arena you are exploring. There is no wrong word, or idea here - just free associate all the parts that make up the system.
You could think about people or groups that are driving the problem directly or indirectly, groups that are already working to change things, decision makers, influencers and any person or group that affects or is affected by the issue.

5. Once you have a page full of random words/concepts/nodes, then start to draw connections between them. This could look like arrows showing how one thing influences another. You could create a key and use different colors to indicate different kinds of influence or connection, such as 'power' and 'government').

6. Keep going until you have filled up your paper - it should be a complete mess of intermingled lines and words! Next, start to identify the key areas of interconnection and try to define three new insights that have evolved from the exercise.

Guiding questions[1]
a) Power: What creates the status quo?
Who benefits from the system? Who loses out?

b) Mindsets: What are the beliefs, rules and norms of this system? What are the dominant narratives?

c) Insights: How does the system behave? What we can understand from the system?

d) Points of leverage: What is the system we want to promote? What are the mindset shifts we want to promote?

    I. Who is already promoting it? What is the counter power in the system?

    II. How can we leverage and accelerate the change we want?

    III. Write some conclusions from your analysis of the newly created map. Use that exercise to inform the next exercise on the Theory of Change.

7. Write some conclusions from your analysis of the newly created map. Use that exercise to inform the next exercise on the Theory of Change.

Facilitation Tips

This exercise doesn't require a lot of active facilitation. Try to give participants as much freedom as possible. The group will really benefit from having a person with extensive knowledge of the issue and the context to help explain the situation. the room for inspiration.

1

System mapping and Theory of Change

1 Inspired by the System Thinking exercise of the campaign accelerator designed by **MobLab** in the campaign accelerator materials

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Creating
Engaging
Campaigns

1

System
mapping
and Theory
of Change

1.2 Theory of Change

Exercise

MODULE	This session is part of Module 1: **System Mapping and Theory of Change**	
ESTIMATED DURATION	**Below** **2** **hours**	Below we outline a 2 hour session, but there are different methods. You can invest from 1 hour to a full day, depending on pre-existing understanding of the campaign, system, topic and the ambition level of the project.
LEVEL OF DIFFICULTY	**Medium**	Facilitation skills are needed.
PARTICIPANTS, WHO SHOULD BE INCLUDED IN THE SESSION	➜ All the people involved in the project. ➜ Might be considerate and useful to involve people affected by the issue or even other movements.	
PREPARATION	If you can, carry out the system mapping exercise first, to help you identify the points of leverage in the system where an intervention might create impact. Where those lead to plans for specific campaigns, you can go on to create theories of change for each campaign as needed. It will be helpful if campaigners - people with technical information and a strategic approach to the issue - can elaborate beforehand what we are looking to change, the change we want to see. This might seem easy, but it needs to be specific and concrete.	
SETTING UP THE SESSION	➜ Materials you need will depend on the method selected.	
TEMPLATES TO PRINT & MATERIALS	There are no templates. This is a free form exercise. ➜ **Slide presentation** ➜ **Theory of Change golden questions template**	

➡ ## Introduction to the session

In this session you'll create your Theory of Change for the campaign. That means identifying how the changes you want to see will be driven by your campaign.

You'll already have identified the leverage points in the system and what you need to change, the "change we want to see". Figuring out the Theory of Change will allow you to draw out a hypothesis and a set of assumptions that can drive us to achieve the change. It can show how people can grow and direct their power to achieve this change.

Purpose

To have a discussion with the entire team on how the change we want will happen. Discussion and debate are essential for designing a successful project: the assumptions we're making about the system, how we believe we can influence change, and how the organization can contribute to the change.

Outcome

A Theory of Change that will inform the next steps in campaign design and implementation.

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Agenda and instructions for the session (step by step)

1. **20 min**
ToC introduction using slide deck.
What is a Theory of Change and why is it critical?

2. **90 min**
Work through the questions to create your Theory of Change.

3. **10 min**
Reflect on the questions and write the final statement or paragraph.

Facilitation Tips

* The key point of this exercise is for people to agree on how they consider that change is going to happen.

* It is important to express and examine any assumptions we're making as we plan this project and discuss how we plan to track those assumptions.

* The more diverse the team that creates the Theory of Change, the more it will incorporate different perspectives and so the stronger it will be.

* Take into account that a Theory of Change might be really broad and specific enough. This isn't ideal for a focused campaign. To generate impact, your Theory of Change must be as specific and concrete as possible.

* But bear in mind that, in the course of any planning process, you might have a broad ToC for your wider campaign and more specific theories of change for specific campaigns that contribute to the wider campaign goal.

* There are many different ways of approaching Theory of Change and ideas about how change happens. The important thing is to settle on a common method with your team and get everyone on board

1

System
mapping
and Theory
of Change

2 Audience understanding

2 Audience understanding

At Greenpeace, we believe that each and every single one of us holds a fragment of the story of how our collective future will be transformed.

Greenpeace is just a word. The people behind it are our power.

We've built our reputation on a story in which we are the hero. And while this has served us well for many years, the world in which we operate has changed. The television broadcast era is long gone. Today's villains are too big to be taken down by a lone hero. The world needs a billion heroes.

This means that we are brave enough to champion the actions of others if it better serves the cause. That we empower, amplify, enable, supercharge and electrify all people working for change. And that we measure our success not in the quantity of followers, but the quality of the acts of courage we inspire.

The Greenpeace mission states "We will put people power at the heart of our work – strengthening, amplifying and working with those who share our vision, hope and belief that a better world is possible". By putting people at the centre, we will identify the different levels of power that people can bring to the campaign and what each one of us can do to create the change we need.

This doesn't mean that we only design campaigns based on research that indicates people will respond. But it does mean that we need to do both, trying to find a good middle ground between listening and talking. It is still important for us to realise our mission to "promote a new perspective and shift in mindsets". This means that we must continue to seek to change mindsets where this will catalyse the society-wide changes we need.

We know what we're doing because we trust our ability to read the world and organise ourselves to make a difference in it.

The next section will provide some tools to help you ensure that you are putting people at the heart of your project plan. At this point, you should have a good sense of the core idea. You should have defined your Theory of Change and explored the systems that touch on your campaign issues. ■

Before jumping into the content, check out this video, it will give you a great overview about audience understanding and how to do this work.

> " We know what we're doing because we trust our ability to read the world and organise ourselves to make a difference in it. "
>
> Greenpeace

2.1

Key players in the campaign systems

Exercise

MODULE	This session is part of Module 2: **Audience Understanding**
ESTIMATED DURATION	**2 Hours minimum** (if you can invest more time, 4 or 5 might be also good).
LEVEL OF DIFFICULTY	**High** An expert on the issue will be needed or at least available to support.
PARTICIPANTS, WHO SHOULD BE INCLUDED IN THE SESSION	➜ **Must have:** Core project team ➜ **Recommended:** Extended project team ➜ **Nice to have:** Local community members, volunteers, political experts
PREPARATION	A well defined system map and Theory of Change (see exercise guide), detailed background information and research on the topic.
SETTING UP THE SESSION	➜ A large sheet of flipchart paper. ➜ Markers for everyone. ➜ A large flat surface to work on.
TEMPLATES TO PRINT & MATERIALS	➜ You can use the example audience pathway diagram.

➡ **Introduction to the session**

We believe that social change needs to be found in systemic changes, otherwise, we will address symptoms but not the root of the problem.

For that reason we encourage you to start your campaign design by understanding your system, identifying where the leverage points are and creating a Theory of Change for how that change might occur. All of this is explained in Module 1, System Mapping and Theory of Change.

So we encourage you to go to the previous step first and do a system mapping exercise. In the first step of Module 2, Audience Understanding, we want to look at the system from a people power perspective and understand who in the system has a role in creating the change.

💡 **Purpose**

To identify the key players that will be involved in this project. To develop a basic understanding of how the key players are interconnected in order to identify the best ways to drive systemic change.

🏆 **Outcome**

A list of key players for your project that are involved in the system you want to change. You should have a basic understanding of how they are linked. You will be ready to conduct some deeper analysis to understand the complexities of these relationships and how they intersect.

Agenda and instructions for the session (step by step)

1. Grab the System Mapping exercise outcome and the Theory of Change

2. Plot Greenpeace to one side and the Key Target to the other side of the sheet

3. Have a common understanding of:

    a) Who has the power to win the campaign? (from the ToC, you can identify different power needed)

    b) How can we leverage and accelerate the change we want?

4. Begin to discuss and plot the players on the sheet

5. Explore and discuss how they are connected to Greenpeace, the key target and to each other.

6. It should be clearer by the end of this process which groups are important for your Theory of Change.

Facilitation Tips

This exercise doesn't require a lot of active facilitation. Try to give participants as much freedom as possible. The group will really benefit from having a person with extensive knowledge of the issue and context to help explain the situation.

2

Audience understanding

2.2 Does the theme resonate in society?

Exercise

MODULE	This session is part of Module 2: **Audience Understanding**
ESTIMATED DURATION	**60** **Minutes**
LEVEL OF DIFFICULTY	**Medium** Facilitation skills are needed.
PARTICIPANTS, WHO SHOULD BE INCLUDED IN THE SESSION	➔ **Must have:** Core project team ➔ **Recommended:** Extended project team, research lead for that country. ➔ **Nice to have:** Local community members, volunteers, political experts.
PREPARATION	A well defined Theory of Change (see exercise guide), detailed background information and a systems map. If you are not a Greenpeace member and don't have access to polling you should use any source of data you have available in your geography. Sometimes some universities publish data about society. Also some public institutions and statistics institutes produce information regarding trends in society etc. For Greenpeace staff: Open the Global Polling Dashboard in Tableau Reader or the web-based version. All information can be found (for Greenpeace staff only) at **https://greennet.greenpeace.org/content/7897/int-greenpeace-surveys.** For non-Greenpeace staff: You will need access to polling research on the issue at hand to do this exercise. If you are just starting out with polling, here is a good introduction to polling. **https://docs.google.com/presentation/d/1rAtw5bLj3YQ2Bjg0DcJa60LXeQgSyF9SXusz2ejBRBM/edit#slide=id.g35f391192_04**
SETTING UP THE SESSION	➔ Each person has access to a computer with the relevant research available to examine. A brief presentation should lead up to this exercise providing the background to the project and outlining the research that participants will use in the workshop. ➔ If you have an expert on audiences, maybe that person can read, analyse and extract insights from different sources before the workshop -- and prepare these for participants in an easy to share format.
TEMPLATES TO PRINT & MATERIALS	There are no templates. This is a discovery exercise that will include a lot of discussion. ➔ Slide presentation with the introduction to audience understanding ➔ You can use that introduction to audience understanding video as support material.

➡ Introduction to the session

In the initial stages of the project planning process, you'll reach a point when it's essential to research whether the ideas you want to communicate will resonate in society. We can get a sense of what people might think about the issue by looking at available polling data. We might learn something new that prompts us to change the plan or it might confirm what we expected. Either way, it is important to step outside of our internal bubble and get a sense for what people think and feel, with data-driven decisions.

Purpose

To find out if this theme resonates with the audiences we need to reach in order to realise the aims of this project.

Outcome

To decide if this project idea will resonate with intended audiences. If yes, proceed to develop the idea. If no, discuss what changes we need to make (e.g. Theory of Change?) and rework previous steps.

Agenda and instructions for the session (step by step)

1. In a small group, open the global polling report on a computer. Even better, have a few laptops or computers open with the report, and printouts of other relevant data sources.

2. If you are using polling data, make sure to select the country in focus and begin to navigate the polling results looking for questions that relate to your theme.

3. Analyse and discuss the results in the report.

   What does the data reveal about the people you're focusing on?

   What might they think or feel about your project's themes?

   Remember to refer to the Theory of Change and check that your discussion is in line with it.

Facilitation Tips

* This session requires very involved facilitation.

* Be sure that all participants have downloaded the software and report files.

* A brief video should be shared before the session explaining how to use the reports.

* During the session, the facilitator needs to be very active in showing participants how to navigate the reports and what to look for.

2

Audience understanding

2.3 Deciding on a target audience using polling

Exercise

MODULE	This session is part of Module 2: **Audience Understanding**
ESTIMATED DURATION	**2** Hours
LEVEL OF DIFFICULTY	**High** — An expert on the issue is needed or at least available to support.
PARTICIPANTS, WHO SHOULD BE INCLUDED IN THE SESSION	➜ **Must have:** Core project team ➜ **Recommended:** Extended project team ➜ **Nice to have:** Fundraising team rep, volunteers
PREPARATION	Before the session, ask participants to have the polling ready on their computers and to understand how to access and navigate the data before this session. Having a systems / key player map already on hand to inform this session. Sending some explanation videos of Glocatilities / VBS / other segmentation modelling will also set up this session for success.
SETTING UP THE SESSION	➜ In groups, it is helpful to have at least one person with a laptop, but more than one is encouraged. ➜ It can be an effective approach to have one or two people navigating the research platform as the rest of the group discusses and requests information.
TEMPLATES TO PRINT & MATERIALS	There are no templates. This is a free form exercise.

➜ Introduction to the session

Who's power do you need to unleash to win this campaign? Once you have analysed the possibilities and made a decision, you're well on the way to success.

A well defined target audience is essential because it lays the foundations for so much of the work to follow. The work you do to define your target audience will shape decisions about your narrative, engagement asks, supporter journey, communications content, channel strategy and more. So it's important to spend time getting it right.

Purpose
Find and choose a primary target audience for the campaign.

Outcome
One selected audience group.

NOTE:_
Ideally, this group should be based on more than simple demographics or vague categories. Value-based (e.g. VBS) or lifestyle groups (Glocailities) are ideal because they help you better understand the frictions, barriers, triggers and dilemmas. They provide more information and insights to inform the rest of your engagement strategy (narratives, journey, behaviours/engagement).

Target audiences should:

➜ Have the potential to directly or indirectly influence decision makers with the actions they take -- their role in the Theory of Change is clear.

➜ Be the subject of polling and research so you have useful information on:

1. How they feel about the issue.

2. How they are likely to engage (channels, level of engagement, etc.)

3. What motivates them

4. What barriers they might face

5. What conflicting ideas they might have with this issue

Avoid target audience profiles that are:

➔ Too broad (or too specific).

➔ Based on overly simplistic dimensions (e.g. age or location).

➔ Based on campaign preference only.

➔ Based on previous behaviour indicators only.

Two simple questions will help us take the first step to discovering our primary and secondary target audiences.

Which group in society has the most potential to directly or indirectly influence decision makers with the power to make the change we want? i.e. which group can help us form a strong Theory of Change, ideally one that can operate at scale, engaging large numbers of people?

Who is most likely to act on this issue?

You can answer these questions with the help of a systems mapping exercise, as described in the previous module, and audience research.

Agenda and instructions for the session (step by step)

NOTE: This exercise is intended for Greenpeace polling users who have access to international data that has been made available. If you are not a Greenpeace employee or do not have access to polling, you can apply these principles in your research.

1. Open the Global Polling Dashboard in Tableau Reader or the web-based version. All information can be found (for Greenpeace staff only) at https://greennet.greenpeace.org/content/7897/int-greenpeace-surveys

2. Once you have the dashboard open, use the country selector to select the countries of interest.

3. Using the segment function in the polling dashboard, choose a lifestyle/values-based segment such as 'Glocalities'.

4. Observe the results from the report and try to spot which predominant Glocalities group (or other profiling system) answered questions related to your theme.

5. Which group indicated that they think this theme is very important to them?

6. Which groups are closest to the centre of the Audience Roles Venn Diagram? (See previous modules)

7. These questions are a good way to get started in using research to understand which groups of people should be our target audience. But allow participants to freely discuss and explore the polling tool.

8. Participants should hopefully land on one group. If not, ask them to make their best decision based on available information, to make it possible to move forward.

Facilitation Tips

* This exercise will require a lot of guidance from the facilitator(s) because there will be an element of learning how to use the polling platform.

* There may be many questions about the way the polling has been designed and researched, so facilitator(s) should be well versed in that area.

* There will be questions about how to use the platform and about the segmentation profiling system.

* As a facilitator, be ready to give lots of guidance and tips during this session.

2

Audience understanding

2.4 Defining roles for the audiences

Exercise guide

MODULE	This session is part of Module 2: **Audience Understanding**
ESTIMATED DURATION	**60** Minutes
LEVEL OF DIFFICULTY	**Medium** Facilitation skills are needed.
PARTICIPANTS, WHO SHOULD BE INCLUDED IN THE SESSION	➜ **Must have:** Core project team ➜ **Recommended:** Extended project team, research lead for that country ➜ **Nice to have:** Local community members, volunteers, political experts
PREPARATION	Systems map on hand with a maximum of three audience groups to explore in this exercise.
SETTING UP THE SESSION	➜ Prepare a big piece of paper with the Venn diagram (see figure 1.1) drawn on it, or create a slide to display the diagram, for example using Google Slides. ➜ Prepare as much audience research as possible and have it onhand for participants to refer to, helping inform their choices. This exercise should show participants how to make practical use of researchl.
TEMPLATES TO PRINT & MATERIALS	➜ Venn diagram for audiences

➜ Introduction to the session

If we define the roles that audience groups will have in this project, it will help us more clearly understand what we need them to do. Our systems map should have explored how different groups are connected to each other. This exercise will help to expand and enrich that discussion. There are a number of questions to consider.

Sometimes we select audiences because we see them as an important group for the campaign project. But this group might not necessarily be the same group that we need to design the entire project to reach. Another group of people might be important for campaign success, but not necessarily very motivated to take action on a large scale. Maybe a group of people don't have the power we need to win the campaign.

How do we know which groups are important to focus on when crafting our main narrative? If we need a large portion of society to support this campaign, how do we ensure that we are telling the right stories and offering the right engagement opportunities to bring people along with us?

We can get started by forming a clear idea of the role of different groups and then decide on a primary audience we want to target.

💡 Purpose

To understand which audience groups we need to target to drive the change we need.

🏆 Outcome

Defined roles for the target audiences of the campaign. We should leave this exercise with a clear understanding of the audiences that are important for success and their overall roles in the project.

Agenda and instructions for the session (step by step)

1. Split into groups. One group per target audience.
No more than 6 people per group is best.

2. Draw the Venn diagram on the flip chart page.

3. Write each target audience on a sticky note (one
sticky note for each target audience).

Using audience research and your systems map to inform your opinions,
begin placing the audiences on the Venn diagram by putting sticky notes
within the circles.

NOTE: It could help for one person to begin placing the sticky note where
they best think it fits. Then, go around the group and discuss/move the
notes as the discussion progresses.

There will be no perfect spot for each note, but it should become clearer
what your audience's role is in this project as you discuss and refer to the
research.

Facilitation Tips

*   Try to encourage participants to use research
to inform their decisions as much as possible.

*   Opinions from the loudest people can
take over the exercise so try to keep
bringing people back to the research.

2

Audience
understanding

2.5 Persona building

Exercise guide

MODULE	This session is part of Module 2: **Audience Understanding**
ESTIMATED DURATION	**3** Hours
LEVEL OF DIFFICULTY	**Easy** Anyone can lead.
PARTICIPANTS, WHO SHOULD BE INCLUDED IN THE SESSION	➜ **Must have:** Core project team ➜ **Recommended:** Extended project team, rep from each department that is responsible for audience work. ➜ **Nice to have:** Someone who represents this segment ie a member of the target audience.
PREPARATION	**Data pack:** Assemble as much research data as possible on the audience segment you are focusing on and consolidate it into a "data pack". You can either print this or provide it digitally, but printing it out can make the information more tactile and accessible in face to face workshops. Be sure to explain the contents and purpose of the data pack as you distribute it, section by section, over the course of the workshop.
SETTING UP THE SESSION	➜ Using the template provided as a guide, create Persona sheets on flipchart paper and distribute one per group/table. Give marker pens to every participant. Have the systems / key players map on hand for reference. ➜ It can be overwhelming for participants to receive the full data pack all at once. Instead, hand out each section from the pack over the course of the session, as the participants progress from one area of focus to the next.
TEMPLATES TO PRINT & MATERIALS	➜ Template for persona ➜ Slides with more information ➜ Video with more explanation about how to create a persona

➡ Introduction to the session

Every time we choose to engage people and ask them to do something, any time we put a piece of content in front of supporters or potential supporters, we have the opportunity to make that moment as relevant and impactful as it can be.

We can choose the channel, the timing, the story and the ask. The more elements we get right for each individual, the more likely they are to act and the more acts of courage will result, helping bring about a green and peaceful world.

The more we (ethically) know about our supporters, the more likely it is we will make the right choices and keep making the right choices to build those individual moments into an effective journey.

What is their lifestage, what values do they share with us, what are they really passionate about? We need to understand what options we have available to us. We must ask ourselves the right questions so we make the right choices at each stage. And we need to have the systems in place to enable us to use these insights to inform all we do in the campaign.

Personas are a helpful tool to visualise and understand our audiences. Personas allow us to take all of the information we have about audience segments and add personality! This helps us build empathy by putting a story and a face to our segments. We make them human, a person. Then when we go to create our narrative, design content or make strategic decisions, it's easy to call this person to mind. That helps us make sure everything is informed by the data we have on our target audience.

Purpose

To understand which audience groups we need to target to drive the change we need.

Outcome

Defined roles for the target audiences of the campaign. We should leave this exercise with a clear understanding of the audiences that are important for success and their overall roles in the project.

Agenda and instructions for the session (step by step)

1. Start by writing the lifestyle group name in the field 'Lifestyle Group'.

2. Review the Glocalities group descriptions and fill out the '5 key facts' section with facts drawn from the data pack and out the Glocailities data pack section for this.

3. Note: Encourage participants not to spend too much time focusing on the name and other basic information of the persona. Participants often get caught up with these small (and fun!) details, but they're not critical.

4. Start to fill out the 'Motivations' section also based on the values descriptions.

5. Step by step, groups will receive additional sections from the data packs with a short explanation by the facilitator (e.g. trust reports, web analytics, owned channel reports, donor data, census, big data, etc.).

6. Navigate and fill out each box in the Persona sheet.

7. Finish the exercise by focusing the group on the 'What's their story?' section.

8. Each group reports back to the whole workshop by reading out their story and basic info.

Facilitation Tips

* Take a step by step approach.

* Guide groups to focus on one section at a time informed by one section of the data pack.

* You might find a better flow this way because it allows participants to focus on one task at a time.

* Use probing questions to provoke thought and point to research that may help to answer key questions.

2

Audience understanding

1

System mapping
and Theory of
Change

2

Audience
understanding

3 **Storytelling**

4

Supporter journey
and meaningful
engagement
opportunities

3 Storytelling

Stories are everywhere and they're as old as humanity. As children - and as adults - we learn by listening to stories. Stories are how we imagine new possibilities.

As campaigners and activists, we can connect with people and change the world by embracing the power of storytelling. The story we tell through a campaign is not so different from one we'd find in a novel, movie or play.

Like these stories, ours will contain certain key elements. There will be settings, characters and conflict. If we want to maximize the impact of our story, we'll need to be as thoughtful about each of these elements as any novelist or filmmaker.

Greenpeace has always had a powerful story at its heart. A better world is possible, and courageous individual and collective actions can make it a reality. Every Greenpeace campaign and action lives and breathes this simple idea, the moral of our organizational story: a billion acts of courage can spark a better tomorrow.

Now, it's your turn to take the lead. Remember, storytelling is an art, not a science. In this module, you'll find powerful processes you can use to create a great

story. But embrace creativity, open your mind and feel free to innovate.

Invite others from different backgrounds and with different life experiences to create the story with you. Lots of diverse points of view will enrich your story and increase your chances of impact.

Your story will form the backbone of all your communications with your audience about the campaign. You'll tell the story in the videos you make, the emails you send, the social media content you post, in the face to face conversations you have.

Of course, the exact language and format will flex depending on the medium. But your story will form the powerful core of all your communications. It'll bring a consistency and offer a compelling hook to engage people.

Your story will make it easy for people to grasp the problem your campaign is trying to solve and to understand their own role as a powerful player. That'll set you up for a winning campaign.■
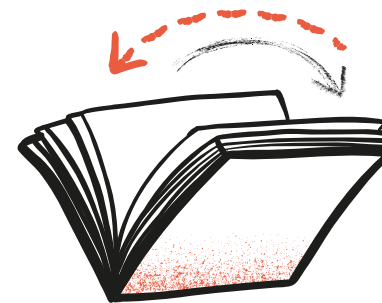
❝ Write your story. Change the world. ❞

Greenpeace storytelling team

3.1 Crafting your story

Exercise

MODULE
This session is part of Module 3:
Storytelling

ESTIMATED DURATION
3-4 Hours
Can be enough to craft a story.

LEVEL OF DIFFICULTY
Easy
Everyone can lead. If possible, have a story expert for the introductory part.

PARTICIPANTS, WHO SHOULD BE INCLUDED IN THE SESSION
➜ **Must have:** the campaign team.
➜ **Recommended:** people affected by the issue.
➜ **Nice to have:** creative people from outside of the project.

PREPARATION
You should have already chosen a target audience and designed a persona template to bring your audience to life. You could even find a picture to illustrate your persona - this is who you'll be telling your story to. It'll help you get into the shoes of the person representing your target audience and get a sense of situated perspective.

The "Audience Understanding" module will guide you through these steps and once complete, you're ready to start crafting your story.

SETTING UP THE SESSION
➜ The participants will be working in small teams. Find one table for each small team if the workshop is face to face, or separate into online breakout rooms.
➜ Each team will need a template to fill in to create the story. Create the templates based on the guide below, either by printing them or drawing them on sheets of flipchart paper for a face to face workshop, or use digital tools like Google Drive, Mural, Miro etc.
➜ Make sure each table has supplies of different coloured post-its because each story element will use a different color.

TEMPLATES TO PRINT & MATERIALS
➜ Use the template for crafting the story
➜ Slide presentation with theory part

➡ ## Introduction to the session

This session will help you put all the pieces of the puzzle together. You'll create a powerful story to make your campaign strategy engaging and easy to understand for your target audience.

Remember that stories shape us as humans. We learn and share knowledge through stories.

💡 ## Purpose
The session aims to use participatory and democractic processes to craft a story that will be engaging and meaningful to your target audience.

🏆 ## Outcome
Essential story elements to guide you in generating communication materials.

GREENPEACE

✎ **Agenda and instructions for the session (step by step)**

1. **45 min**
Introduction to Storytelling.
If you feel comfortable, you can present the slide deck. If not, please, share the video link with the participants.

2. **15 min**
Introduction to the workshop:
What we are going to do and how.

3. **60-90 min**
Working out the strategic elements of the story.

Dominant and counter narratives: Before you craft your story, you need to consider the values and norms that people have consumed through the dominant culture. Mapping dominant narratives that relate to your theme will allow you to navigate and design a counter narrative strategically.

Frames: It's like choosing a particular lens through which to see your story. Try to define a frame that will motivate your audience.
https://storytelling.greenpeace.org/exercises/#frames

Conflict: What is the challenge (the problem) this story aims to resolve? What opposing forces are at play? Think clashing worldviews, values, material realities. https://storytelling.greenpeace.org/storytelling-guide/crafting-a-story/#what

4. **60 min**
With this in mind you can now start to craft your story.

Characters: Whose story is it? Determine the protagonist and study your antagonist. What other players are in the field? Who are they and how do they behave?
https://storytelling.greenpeace.org/storytelling-guide/crafting-a-story/#who

Setting: Every narrative takes place in a particular location. Specific sights, sounds and smells will give your story texture and real world associations. With your target audience in mind, you can now define the setting that will resonate with your audience.

5. **30 min**
Conclusions

Facilitation Tips

* The best manner to craft the story is focusing on one element at a time.

* Make sure people have time to fully craft that element. Once people are ready, move together to the next element.

* Storytelling is an ART. Try to set up a creative atmosphere, where people feel comfortable, creative and inspired.

* You could even bring some story books into the room for inspiration.

3

Storytelling

3.2

Messenger and example

Exercise

MODULE

This session is part of Module 3:
Storytelling

ESTIMATED DURATION

1-2 **Hours**

Can be enough to craft a story.

LEVEL OF DIFFICULTY

Easy

Everyone can lead. If possible, have a story expert for the introductory part.

PARTICIPANTS, WHO SHOULD BE INCLUDED IN THE SESSION

➔ **Must have:** the campaign team.
➔ **Recommended:** people affected by the issue.
➔ **Nice to have:** creative people from outside of the project**.**

PREPARATION

We need to craft our story and have all the elements of the story (from previous exercise)

Once we have the story crafted, we can merge all the elements in one example.

SETTING UP THE SESSION

➔ Try to keep 1 table per team to work on.
➔ Might be great to have some stationery material like scissors, glue, cardboard etc.

TEMPLATES TO PRINT & MATERIALS

This exercise is a follow up from the previous one.
Use the previous template.

➡ ## Introduction to the session

This is the second session for storytelling work. After crafting the story elements for your campaign, we invite you to create some examples that can help guide future communication materials and content.

💡 Purpose

Create an example to merge all the elements of the story and illustrate how this would look if it was real campaign content.

🏆 Outcome

Some examples of communications content (blog, Facebook post, Instagram story) as guidelines to help create real campaign assets in the future.

GREENPEACE

Agenda and instructions for the session (step by step)

1. 15 min

Introduction, what we need to do. Messenger and content creation.

2. 60 min

Who is your messenger? Who is telling the story? What about them makes them the emotional core of the story?

3. 30 min

Creating the plot. Stories capture our attention and make us wonder: "What happens next?" Think backwards three steps from the end of the story: What needs to happen to reach that point? When you have three stepping stones between where you are NOW and where you aim to go, list some actions that can help you reach the stepping stone and advance the plot.

4. 60 min

Now create an example communication piece inserting the messenger and using the list of actions that advance the plot to create a story. You can record a video with mobile, create a IG post with cardboard, or write a newspaper article here. Be creative!

5. 30 min

Present the pieces to the entire team, giving an introduction to the elements of the story and the example the team created.

Facilitation Tips

* It is important to generate a creative atmosphere. You can set some music and maybe even some food (candies, fruit etc).

* Give people the freedom to think outside the box and generate an example that is different, innovative and engaging.

* Some examples are people recording a video with mobiles, or designing an IG post, or a press release. You could make a radio advertisement. Anything is possible.

* Try to record the presentation of each team. They can use the presentation to share with the rest of the wider campaign team as an outcome of the workshop, or to remember the important pieces of the story.

3

Storytelling

1

System mapping and Theory of Change

2

Audience understanding

3

Storytelling

4 Supporter journey and meaningful engagement opportunities

4 Supporter journey and meaningful engagement opportunities

Designing a supporter journey will help you figure out "what's next?" for supporters at any given moment in your campaign. And your supporter journey will help you keep momentum up on your campaign and escalate pressure on your campaign targets.

It'll do this by making sure you send your supporters compelling asks and messages that speak to them where they are now -- and direct them in an intuitive and inspiring way to where you want them to go next.

You can plan a supporter journey based on the expected timeline and trajectory of your whole campaign. Or you could create specific mini-journeys for individual phases or particular segments of your target audience.

The supporter journey could go in different directions based on the actions an individual takes, what they understand about the campaign and how they engage over time. Of course, you will need to be flexible as your campaign progresses, but a supporter journey planned in advance will form a hugely useful foundation even if you decide to change direction.

You might also find it useful or interesting to think about how the supporter journey for this campaign fits into the wider supporter journey that covers a supporter's whole experience with your organisation or movement.

At Greenpeace, we think of this wider supporter journey as a "Supporter journey" that is made up of linked "mini-journeys" specific to particular campaigns or projects that aim to achieve short or medium term goals.

We don't have much time left to achieve the world-changing impacts we seek for a green and peaceful world. Designing supporter journeys is a way to ensure we make the most of our campaigns when it comes to engaging people in a sustained way that expands their horizons and deepens their engagement with our movement.

Planning sets us up for success but spontaneity and responsiveness are vital too -- sometimes you need to seize the moment. The more you know about your audience the easier it will be to put yourself in their shoes and make the right calls. So let's dig in.■

> ❝ Make every interaction count, even the small ones. They are all relevant. ❞
>
> Shep Hyken

4.1
Exercise

MODULE
This session is part of Module 4:
Supporter journey and meaningful engagement opportunities

ESTIMATED DURATION
30
MInutes minimum

If you can invest more time, you could make this session more interactive in order to check that participants are understanding the concepts.

LEVEL OF DIFFICULTY
Low

This is an **introduction of the core concepts in this presentation.** However because of that it is important to ensure that the facilitator/presenter has a good grasp of this content before starting the session.
You can use this slide deck and the following videos as support:
➜ SJ introduction
➜ Meaningful Engagement Opportunities

PARTICIPANTS, WHO SHOULD BE INCLUDED IN THE SESSION
➜ **Must have:** Core project team.
➜ **Recommended:** Extended project team.
➜ **Nice to have:** Members of the target audience or people who could experience the journey.

PREPARATION
Facilitator should ensure they understand the key supporter journey concepts and can talk about them in their own voice. An understanding of the existing approach to supporter journeys in the office/organisation will also help the facilitator to adapt these broader concepts for the specific context of this campaign.

SETTING UP THE SESSION
➜ Space to present and discuss the concepts.

TEMPLATES TO PRINT & MATERIALS
There are no templates.
This is a presentation of concepts.
➜ **Slides with content**
➜ **Video with some pieces of the theory explained**

➡ ## Introduction to the session

People-centred campaigning relies on getting people to act. That means we need to optimise every communication we have with supporters and ensure every opportunity we give them to act is as compelling as possible. Creating a supporter journey will help us generate an inspiring series of engagement opportunities for our target audience that will deepen their engagement and keep them taking action with us.

💡 Purpose
To introduce the key concepts of the supporter journey to help build an effective and engaging mini-journey for this campaign.

🏆 Outcome
Each participant should have an understanding of what a supporter journey is and the key concepts around it. They should begin to consider how this applies to their campaign and have an idea of the choices they face inbuilding a successful mini-journey.

Agenda and instructions for the session (step by step)

Work through the concepts in order, give people a chance to discuss and ask questions.

1. Introduce the issue that a lot of people only do one action with Greenpeace despite all of the time and resources we invest to engage them. Efficient and effective people power needs us to maintain and deepen relationships so people keep taking action to change the world.

a) This is even more effective if you can personalise with your own statistics showing the challenges with ongoing engagement in your local, regional or national context.

2. Provide a definition for engagement.

a) You can ask participants to come up with their own definition and compare it to this version.

b) Focus on the fact that a successful supporter journey relies on intentionally taking control of the journey and proactively choosing what communications a supporter receives and when in order to achieve our goals.

3. Give an overview of the vision for engagement.

4. Let people know that we can create experiences to influence attitudes that then drive behaviour and deliver results.

5. For Greenpeace, explain how we link the meaningful engagement opportunities we create together to build mini-journeys which then connect to form the overall supporter journey that someone experiences over their lifetime of being part of our organisation.

6. Talk through the Stages of Engagement.

a) Show how they are relevant both to the relationship every single person has with an organisation over their lifetime but also, on a smaller scale, their relationship with an individual campaign. Each person will be at one of those stages right now.

7. Introduce the concepts of meaningful engagement opportunities, the 4R's and the comms cycle to show how they give us the building blocks to create an impactful mini-journey.

8. Allow for any questions.

a) If you have time you could split everyone into mini-groups to discuss the concepts and surface any issues or questions.

4

Supporter journey and meaningful engagement opportunities

4.2 Engagement opportunities

Exercise Guide

MODULE	This session is part of Module 4: **Supporter journey and meaningful engagement opportunities**
ESTIMATED DURATION	**60 MInutes minimum** — You can always invest more time in creative facilitation to generate as many engagement ideas as possible.
LEVEL OF DIFFICULTY	**Medium** — There are a **number of key ideas in the presentation which you need to work** through to ensure participants have what they need to brainstorm a well balanced set of engagement opportunities which are appropriate for the campaign.You can use the slide deck for support.
PARTICIPANTS, WHO SHOULD BE INCLUDED IN THE SESSION	➜ **Must have:** Core project team ➜ **Recommended:** Extended project team especially those with direct experience of designing impactful actions that help win campaigns. ➜ **Nice to have:** Members of the target audience.
PREPARATION	The facilitator should ensure they understand the key supporter journey concepts and can talk about them with confidence. It will also help if the facilitator has an understanding of the existing approach to supporter journey in the office/organisation, in order to adapt these broader concepts to the specific context for this campaign.
SETTING UP THE SESSION	➜ Space for group work. ➜ Pens and post it notes. ➜ Printed templates or flip charts. ➜ Creative facilitation tools to enhance brainstorm.
TEMPLATES TO PRINT & MATERIALS	The grid combining the pyramid of engagement with the different types of engagement can help with brainstorming a wide range of meaningful engagement opportunities. The balance grid can also be used to prioritise audiences and meaningful engagement opportunities as an additional task. ➜ **Video with introduction to meaningful engagement opportunities** ➜ **Slides with more information** ➜ **You can use that template if considere that helps.**

4

Supporter journey and meaningful engagement opportunities

➡ **Introduction to the session**

Every time we connect with a person during our campaign, we have an opportunity to get them to take an action with us to help change the world. But not every individual will be interested in doing the same thing.

We know from our work mapping the system and understanding our audiences that the people we are talking to have different priorities, levels of interest, power within the system and different resources at their disposal. So the more opportunities and possibilities we create for people to have an impact, the better placed we'll be to put them together into a journey that deepens people's impact over time.

However, it's essential that everything we ask people to do is meaningful. As we saw in the last session, that means every action has potential for people to create impact in the real world. We must also aim to find a balance when it comes to which audiences we decide to target and what actions we offer them. A balance that allows us to achieve short term campaign impact while also making significant system change more likely in the future by growing our movement.

So this session sets out how to brainstorm a diverse range of ways people can support the campaign. These actions will form the foundation of the supporter journey.

💡 **Purpose**

To brainstorm meaningful engagement opportunities which we'll combine to form the supporter journey for our world-changing, people-powered campaign.

🏆 **Outcome**

We will have worked through the different ways people could help us to achieve our Theory of Change. There is also the opportunity to brainstorm a wide range of meaningful engagement opportunities for your campaign.

GREENPEACE

Agenda and instructions for the session (step by step)

Work through the concepts in order, give people a chance to discuss and ask questions.

1. **(Slides 1-4)** Focus on the shared objectives. The team is coming together to change the world and the supporters are hoping to join us. So we need to think about how the journey helps the campaign to achieve this. Engagement provides the link between the campaign and the audiences.

2. **(Slides 5-14)** Balancing short term campaign impact with long term growth of an effective movement is key to securing significant and sustainable systemic change. The grid helps us think about how to choose meaningful engagement opportunities and audiences that create the best balance for the campaign and the movement as a whole. Work through the grid as shown in the presentation. Pay special attention to the What Else and What Next elements as they'll show you how to amplify and maximise the elements of the campaign.

3. **(Slides 15-19)** Present the pyramid of engagement. Walk through each of the levels in as much detail as the participants need. The key thing to focus on is the different levels that supporters can engage with the campaign. Where do people start? How can we deepen their engagement over time? Remember that it's too simplistic to think that people will simply move in one direction up the pyramid. This is more about making sure we have a range of different options for our audiences throughout the campaign journey.

4. **(Slides 20)** We should think about the depth of engagement for each meaningful engagement opportunity we create but also the different types of engagement people can engage in. We have classified them in four ways based on what the supporter has to offer the campaign.

5. **(Slides 21-23)** Run people through the task to brainstorm engagement ideas for their campaign. Use the grid mapping the pyramid of engagement against the different types of engagement to help create a wide range of different options.

Facilitation Tips

* Help the group come together by focusing on shared objectives. This can be especially important if participants are coming from a number of different departments.

* There are a lot of different ways to generate engagement ideas. Use whatever creative facilitation techniques you are most familiar with to inspire your participants to have fun and come up with new ideas.

* At Greenpeace, we often find that the middle of the Pyramid of Engagement is neglected, so it could be worth prompting participants to pay special attention to this area during the brainstorm.

* Remember that the concepts we've created to help you think about the different ways to engage people are just tools. There are no perfect right or wrong answers, and some actions could easily fit under more than one heading. The important thing is that you generate a broad range of options for people to take action in different ways. Use the tools to inspire you in the brainstorm, not to limit or confuse you.

4

Supporter journey and meaningful engagement opportunities

4.3 Journey strategy

Exercise

MODULE	This session is part of Module 4: **Supporter journey and meaningful engagement opportunities**
ESTIMATED DURATION	**120** **MInutes**
LEVEL OF DIFFICULTY	**Medium** — But the facilitator may need to provide lots of support for participants as they work through **the key task in this presentation.**
PARTICIPANTS, WHO SHOULD BE INCLUDED IN THE SESSION	➡ **Must have:** Core project team. ➡ **Recommended:** People with experience of using relevant engagement systems, platforms and channels to help plan how the journey will be delivered. People with insights experience to understand how to measure success. ➡ **Nice to have**: Extended project team.
PREPARATION	Familiarity with outputs from all previous sessions. Understanding of the task and how it will run with this group. Understanding of the tools used for supporter journeys in your organisation.
SETTING UP THE SESSION	➡ Space for group work. ➡ Reminder of all of the elements agreed in previous sessions - Theory of Change, audience, story, engagement opportunities - which will be drawn on to create the supporter journey. ➡ Pens and post it notes. ➡ Printed templates or flip charts.
TEMPLATES TO PRINT & MATERIALS	➡ **Supporter journey strategy canvas.**

➡ **Introduction to the session**

Once we have the foundational elements of an engaging campaign - including the Theory of Change, audience understanding, clear story elements, meaningful engagement opportunities etc, then we can build them together into an effective journey for this campaign.

In this session we'll consider some key questions that will help us build a great supporter journey. What do we want to achieve? How will supporters start engaging with this campaign? What will we do to keep them taking action and deepen their engagement? Where are people at the start of the journey, where do we want them to be in order to help us achieve our Theory of Change and how will our journey help them get there?

Purpose

To begin the process of designing a compelling supporter journey for the campaign by setting KPIs and identifying expected key moments and messages.

Outcome

➡ Clear KPIs around what will make the journey successful.

➡ A defined starting point for the journey.

➡ Initial thinking around what needs to happen through the journey.

Agenda and instructions for the session (step by step)

1. **(Slides 1-5)**
Set up the task by walking people through a supporter journey as a start point, an end point and all the elements of getting from one to another. Focus on supporters need for Inspiration and Opportunity from each communication to move them through the journey.

2. **(Slides 6-7)** Run participants through the task:

a) Identify a single priority audience

b) (Box 1, Pink) Brainstorm the outcomes which would make the time and resources we are investing in this campaign a success with that audience. Is it about taking action? Is it about understanding our messaging and sharing it with others? Is it about achieving a mindset shift? Is it donating, changing behaviour, building a movement? What does success look like?

c) (Box 2, Blue) This audience will be acting through us to have an impact in the world, so why are they choosing to invest their effort and passion with us? What are their expectations? Trust is such an important factor in whether someone stays active with an organisation or not. So what are they trusting us to do and how can we make sure we deliver on that for them?

d) (Box 3, Green) To effectively plan a journey you don't just need to know where you're going, you need to know where you're starting from. What has Greenpeace presented to the supporter and what action have they have taken which has triggered the start of this journey?

e) (Box 4, Orange) Flip things around and look at it from the supporter's point of view. What is happening in their life that sets the backdrop for the actions that they have taken? What do they know about this issue and why do they care? What are they thinking and feeling and how is that impacting their choices?

f) (Box 5, Red) Once we have the frame for our journey we can start to plan how to build our journey to take our supporters from where they are to where we want them to be.

➜ What is the role of our communications and how do we want them to be received by the supporter?

➜ How do they build together in a way that is appropriate to the situation, meaningful for the supporter and impactful for the organisation?

g) Write a set of at least three principles that we need to follow for this journey to be successful.

Facilitation Tips

* Connect this task with the outcomes from previous sessions - this should be a culmination of all the thinking to date.

* Be flexible and give each group time to work through the different sections of the task. If some groups need extra time to finish their thinking, consider running the small group discussions into a long break, to allow extra time if needed before groups report back their ideas to the whole workshop.

* This can be repeated for each audience of the campaign. Similarly this can be developed for the overall campaign or focused down on one specific phase and repeated as necessary.

4

Supporter journey and meaningful engagement opportunities

4.4 Journey mapping

Exercise

MODULE

This session is part of Module 4:
Supporter journey and meaningful engagement opportunities

ESTIMATED DURATION

60 **MInutes minimum**

Given the complexity of the supporter journey grid, you may wish to give the groups more time to work everything through. You can also choose to allow more time if you want to work through multiple grids for different campaign moments or different audiences.

LEVEL OF DIFFICULTY

Hard

The grid that people will be working through is complex and often raises a lot of questions. So as well as familiarising yourself with **the content in this presentation** you may wish to get support in preparing and/or facilitating this task.

PARTICIPANTS, WHO SHOULD BE INCLUDED IN THE SESSION

➜ **Must have:** Core project team
➜ **Recommended:** People with experience of using relevant systems, platforms and channels to help plan how the journey will be delivered. People with insights experience to understand how to measure success.
➜ **Nice to have:** Extended project team

PREPARATION

Familiarity with outputs from all previous sessions, especially journey strategy.
Understanding of the task and how it will run with this group
Understanding of the tools used for supporter journey in your organisation

SETTING UP THE SESSION

➜ Space for group work.
➜ Display or distribute the outputs from the journey strategy session.
➜ Reminder of all of the elements agreed in previous sessions - Theory of Change, audience, story, engagement opportunities - which will be drawn on to create the supporter journey.
➜ Pens and post it notes.
➜ Printed templates or flip charts.

TEMPLATES TO PRINT & MATERIALS

➜ **Supporter journey grid to be completed.**
➜ **Slide deck with content**

4

Supporter journey and meaningful engagement opportunities

➜ Introduction to the session

When we have our supporter journey strategy and know what we need the journey to achieve we can begin to map out specific moments in each phase of the campaign. How will we combine the key story elements and engagement opportunities together for a specific target audience? How do those key elements change over time but also as people take action with us and deepen their engagement with the campaign?

Purpose

To begin the process of making the supporter journey more specific and tangible set against a timeline.

Outcome

A completed supporter journey grid for a key phase of the campaign for a specific target audience.

Agenda and instructions for the session (step by step)

1. **(Slides 1-3)** Remind participants of the supporter journey strategy they have already developed and what it is trying to achieve: to provide inspiration and opportunity at each stage to get people to take action and deepen their engagement. Reintroduce the concept that a journey is simply a series of communications planned one after another; and the key decisions we need to make are how we will combine the ask and the message.

2. **(Slides 4-6)** Introduce the journey grid. Show people how it can be used to map changes in the ask and the message over time and as people deepen their engagement. The grid has a 3x3 layout with three levels of engagement and three time periods: before, during and after a key moment in the campaign.

3. Run participants through the task:

a) Identify a single priority audience for a key moment in the campaign.

b) Remind yourself about the agreed supporter journey strategy and add to the template the ideal starting and end points of the mini-journey around this key moment based on the strategy.

c) Get each group to complete the grid by writing in a combined message and to each section of the grid. Participants should think about how the supporter moves from one part of the journey to the next, and ensure the message and asks flow together in a way that makes sense.

Facilitation Tips

* When introducing and explaining the exercise, make sure to show how it builds on the outcomes from previous sessions. The supporter journey should be a culmination of all the thinking to date.

* Be flexible and give each group time to work through the full grid. If some groups need extra time to finish their thinking, consider running the small group discussions into a long break, to allow extra time if needed before groups report back their ideas to the whole workshop.

* You can run this grid exercise multiple times to work through the different audiences and campaign moments, or you can give different moments and audiences to different groups to work on at the same time.

* To move down a level of the grid requires the supporter to take some kind of action. Each group can decide what it takes to move down a level. But a simple way to structure this is to have a supporter's first action move them from First Engagement to Build Relationship and their second action move them from Build Relationship to Deepen Engagement.

* If in doubt about which campaign moment to pick, use the launch of the campaign.

* In past experiences of running this session, people often don't fill in the entire grid. But the exercise usually at least inspires some form of supporter journey for the campaign. Be flexible with the exercise and let it inspire participants rather than constrain them.

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Supporter journey and meaningful engagement opportunities

Creating Engaging Campaigns