

Messaging and Creative Development

We can't overstate this (though we're getting awfully close)! Messages need to reach and convince your target audience, not your executive director, your favorite donor, the chair of your board, or your most strident opponent. You need to reach your target audience where they're at, and appeal to their deeply held values, using language they can relate to (see *The Art and Science of Framing an Issue*).

If You Can't Test It, Don't Run It

Non-profits often argue that they can't afford to test their messages. We argue that they can't afford not to. It's like buying a car and forgoing insurance. If you have the money to run a campaign, spend the money to ensure it'll be effective. If your budget is thinner than single-ply toilet paper, even a quick-and-dirty test is better than nothing. If you have to, run your ad by your brother-in-law (not the one who loves you, but the one who looks a little nervous whenever you drop by). Alternatively, knock on the doors of a few neighbors, or show your creative to random strangers at the local shopping mall. Even these basic techniques can help you identify red flags and fine-tune your message. See "*Creative Testing*" for more information on how to do this.

Messaging and Creative Should Be Based on Research

We're not fans of the *Martha Stewart Living* magazine. And we'd rather have a root canal than spend our holidays weaving homemade wreaths from common household scraps. But Martha Stewart loyalists would cancel their subscriptions in droves if the magazine suddenly started looking like *Harpers*, one of our favorites. Why? Because we just stopped speaking the language Martha's fans care about.

If you're talking to people who aren't like you, you'll be more effective in reaching them if you can speak their language. You believe in your cause, but as part of your campaign, you'll be talking to people who don't (yet) believe in it. Put simply, you'll be talking to people who don't think like you do.

No matter how well you believe you know your target audience, the reality is that they know themselves better. That's why campaign messages based on research are invariably more successful than those developed by intuition. Your intuition may

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"Those campaigns in which the group has predetermined a message are usually doomed to failure."

—*Foundation Center, 2004.*

be reliable when it comes to you, but it's less reliable when it comes to someone else. Effective messaging requires that you:

- Research how the target audience thinks and why
- Devise messages based on the research
- Test the messages to ensure they work

Six Steps to Effective Messaging and Creative

1. **Use qualitative research to understand the target audience.** At the preliminary stage of message development, it's more important to understand *how* people think than to understand their level of support for your issue. How do they talk about your issue? What metaphors and patterns of reasoning do they use? What connections do they form to other issues? What language or words trigger defensive reactions? Clues may come from what's omitted and moments of inconsistency.

Note that learning *how* people think about your issue requires qualitative, not quantitative, research. While polls help you understand levels of support, pinpoint your target audience, and identify reactions to specific messages, polls

Tip: Start by reviewing existing market and opinion research. You can learn a lot by watching the focus group videos or reviewing the polling data of like-minded organizations. Supplement existing research with your own focus groups, or, if you can't afford those, conduct some one-on-one interviews. This will help you gear the research to your particular issue, target audience, or geography.

won't help you understand the subtleties of what your target audience believes, why they believe it, and how they talk about it.

2. Develop messages for testing. Based on your research, develop messages for testing. This is your time to experiment. Don't test five variations of a similar message; instead, develop different messages and see what works. For example, let's say you want to convince others to care about global warming. One approach might ask people to take responsibility for the world they leave their grandchildren. Another approach might showcase the consequences of global warming on the natural world. Appealing to posterity is a very different approach than showing photos of melting ice caps and starving polar bears. Once you determine which approach is more effective, you can start to fine-tune the specific language, imagery and delivery of your message.

Some questions to ask when drafting a message are:

- What are you asking people to do, think, or feel as a result of the campaign?
- Does the message appeal to the deeply held values of the target audience without triggering an opposing frame?
- Is the message appropriate, given the education, perspective, and values held by your target audience?

- Are the messages based on what you know about the opinions of your target audience?
- How will your messages stand up to confrontation and criticism?

3. Test the messages. Effective messaging isn't about wanting to say something and then just simply saying it; it's about knowing what you want your messages to do (e.g., get people to vote a certain way), and then figuring out what you need to say to make that happen. This takes research, not intuition. The only way to know if your messages will do what you need them to do is to test them.

You can test your messages qualitatively or quantitatively. While qualitative message testing gives you insight into how people respond to your messages and why, it doesn't give you any assurance that your broader target audience will respond in the same way. If you want quantitative data (i.e., data that's statistically valid) you can use polling to test different wording and have respondents rate whether or not it's compelling. For more information see *Qualitative Research* and *Quantitative Research* in this toolkit.

4. Refine the messages and develop the creative. Use your message testing results to develop your final messages. Now it's a matter of fine-tuning and creative execution. At this stage, you know what you're going to say. Now it's a matter of how exactly you'll say it. In an ideal world, you'd develop different versions of the creative and do one last round of testing.

5. Test the creative (qualitatively). Before finalizing the creative, test the complete package, including imagery, text, headlines, etc. The creative testing can take different forms depending on your budget. You can test storyboards, mock-ups, or even "finished" ads (see *Creative Testing*). If you have an adequate budget, start by testing different ad concepts. Then, refine the winning concept to understand how changing certain elements will impact the ad's effectiveness. For example, two ads with the same copy and layout, but with different background imagery, could impact the same audience totally differently. Look to understand how people respond to different headlines, words, and images. Again, use the brother-in-law test if you don't have a budget for anything else.

Six Steps to Effective Messaging and Creative

1. Use qualitative research to understand the target audience

2. Develop messages for testing

3. Test the messages

4. Refine the messages and develop the creative

5. Test the creative (qualitatively)

6. Refine and finalize

- 6. Refine and finalize.** Fine-tune and finalize the creative that most successfully moved the target audience.

Stay on Message!

Once you've figured out your message, stay on it! This requires discipline. It's easy to be pulled off message by current events, bad press coverage, baiting by opponents, or supporters who want wording that resonates with them. The public may enjoy the mud-slinging between Rosie O'Donnell and Donald Trump, but if you start throwing mud pies at your opponents, the focus will be on the mud, not the campaign message. Good messaging means repeating the same message over and over. See "*Interviewing Like A Pro*" for concrete examples of how to stay on message when your opponents or the media try to knock you off.

"Language use is a science. [It] is also a discipline. In many [Republican] offices there is a pizza fund. Every time you use the "wrong" language, you have to put a quarter in the pizza fund. People quickly learn to say tax relief or partial-birth abortion, not something else."

—George Lakoff, *Don't Think of an Elephant*



CASE STUDY: FRANK LUNTZ, REPUBLICAN POLLSTER

The effective messaging of the political right has been a source of both admiration and frustration in progressive circles. One pollster, Frank Luntz, was particularly influential in guiding Republican messaging in the 2004 election. Frank Luntz's messaging playbook, *Language of the 21st Century*, provided conservatives with ready-made messaging for use across a range of issues, from health care to the U.S. budget to affirmative action. In order to figure out what worked, Frank Luntz made a massive investment in qualitative research, conducting more than 200 focus groups! He probed for values, fears, hopes, and dreams, going far beyond previous telephone polls. For example, traditional phone surveys typically found that the economy and national security are a few of "the most important problems facing America today." However, deeper probing found that the real issues people worry about are much more personal. They include "the disintegration of morality in society," "the breakup of the family," and "the declining quality of life." These three worries appear to explain the fundamental motivation of more than 80% of Americans, though only 2% to 3% of telephone survey respondents identify them directly.

Luntz's findings had a huge impact on conservative messaging. He recommended that conservatives embrace an agenda that addressed the "moral crisis" Americans felt by focusing on faith, family, and community. Even issues like crime were cast in terms of individual responsibility and moral accountability. This messaging shift helped Republicans win the 2004 election.

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