

# MEDIA OPERATIONAL PLAN CHECKLIST

Foundational research on the target audience and a scan of the media landscape will inform a strategy to guide tactical decisions regarding the use of media to disseminate campaign messages and materials. A media operational plan is a helpful tool for implementing this strategy, identifying key dissemination activities and their corresponding budgets, timelines, and contextual considerations. The below checklist describes the operational activities required for successful media dissemination:

Determine the media mix (e.g., if the strategy is to broadly disseminate campaign messages to an audience that uses traditional media types, a corresponding tactic might be to purchase television and radio advertisement space).

- A well-rounded campaign should include a blend of owned, earned, social, and paid media (with proportions for each determined by an understanding of what will best reach the target audience).

Determine if advertising, monitoring, and/or technology development firms are needed to support the campaign.

Develop functional budgets for major expenses, including paid media purchases, staff, websites, and agency fees.

Determine the timing of message publication. Should it be seasonal (heavier at the onset of peak demand or another period), steady (constant awareness for each new audience member), or flighting (heavy amount of dissemination during short periods, like bursts of information)? What time of day is best to reach the target audience?

- Audience analyses and media landscape assessments will inform these decisions.
- Consider reach (what is the aim for many individual people will be exposed to the campaign?) and frequency (how many times should individuals be exposed to the content?) when determining content dissemination and audience interaction.

Establish specific tactics and approaches for earned media engagement. For example:

- Define local story angles, working with local spokespeople and community partners to determine the right story to tell, the appropriate voice it should come from, and the media platform it belongs to.
- Continuously monitor the environment for earned media opportunities and engage with reporters and other contacts to gain placements.
- Develop a targeted earned media list for 1:1 pitching, based on relevance to the campaign and expected reach/ impact on the target audience (e.g., top-tier national outlets, health sector outlets, local trusted news outlets).
  - Include print, radio talk shows, online outlets, local morning, or nightly news segments in the list.
- Develop proactive earned media tools: targeted pitches, press releases, op-eds, press conference runs of show, campaign assets (e.g., PSAs and testimonials), event calendars, research briefings, and media kits (the tools listed above, plus backgrounders and/or fact sheets and bios for key personnel).
  - Note that having existing rapport with journalists is more successful than cold calls. Consider this when hiring staff for earned media outreach positions.
  - When calling attention to a specific campaign activity, event, or milestone, develop press releases tailored to each outlet's audiences and focus areas (i.e., if it is a healthcare-focused publication, emphasize the health benefits of the program; if it is a technology-focused publication, emphasize the technological aspects of the program).

Establish specific tactics and approaches for social media engagement. For example:

- Identify relevant online handles to follow.
- Develop and disseminate clear policies on how and when to engage in online conversations.
- Determine if/ how online influencers might be leveraged for a "people like me" approach, and establish a process for engaging them (e.g., vet their background, story, expertise, interest, and readiness for campaign engagement).

- Establish an approach for monitoring and addressing online misinformation and disinformation.
- Plan to monitor and engage with social media accounts at least twice per day.

Establish specific tactics and approaches for paid media engagement. For example:

- The paid media budget should include splits by channel type.
- Consider launching a paid media plan in phases (e.g., phase I – paid social, hyperlocal display and programmatic display, phase II – all other paid channels simultaneously).
- Define targeting parameters with neighborhood and demographic data for paid media placements.
- Before delivering digital assets to paid media outlets, tag content for performance tracking.

Develop a detailed timeline (week by week) to plan for publication of key messages and creative assets on each media channel, including the target publication date, activities needed to reach the target, responsible parties, resources needed, and cost.

- Prior to rollout, build time for spokesperson and key staff media training.
- Determine internal lead time for development and editorial reviews of creative materials, PSAs, earned media tools, and other campaign materials.
- Map out the lead times needed by media outlets for editorial reviews and publication planning to determine target delivery dates.
- Be aware of potential messages or content overlap across channels, including similar or competing messages external to the campaign.
- Build in time for media plan evaluation. This should begin at the start of the media strategy with identification of performance metrics, data requirements, and data sources aligned with the overall campaign goals. It should be a continually iterative process that informs media strategy adjustments.

Establish a data collection plan and a system for tracking and documenting data.

Develop a reporting template, structure, and cadence (e.g., dashboards, weekly performance reports). Generate content to share best practices and provide easy-to-understand insights to amplify efforts.

Assess and capture issues management topics. Develop a proactive list of questions and answers to support readiness for challenging media queries (and update in reaction to emerging issues).

Track and monitor performance over time. Identify trends and patterns (e.g., the channels driving the most traffic or action). Use data to adjust the approach as needed.