

# best PLAN YOUR YEAR

## A GUIDE TO GET YOU FROM BIG-PICTURE PLANNING TO WORKABLE SYSTEMS

*for stretched-thin, do-it-all, mission-minded communicators*

### how to use this guide

This guide is designed to help you design a great 2019 through effective communications, realistic goals and actionable strategies. It's made for one-person communications teams at nonprofits, solo entrepreneurs and other mission-minded marketers who may not have a big team to brainstorm with or a communications savvy supervisor to offer wisdom.

Before you begin, gather your work from 2018: Any plans or calendars you used, publications you produced (like newsletters, annual reports, brochures, etc.), event summaries, metrics, performance reviews, print out key areas of your website or blog highlights, and anything else that gives you a glimpse into the work you did over the past year. Don't limit this stack to your smashing successes. Oh, and print this guide out. If your organization has a strategic plan, bring that, too.

I'm a firm believer that getting your face out from behind a screen can help clear your head, so I highly recommend paper copies so you aren't tempted to check your email or peruse Twitter when you get stuck on something. Schedule an afternoon away from your desk, set aside your daily to-dos and work through these steps. By the end of this worksheet, you will have manageable next steps to help you proceed, surefooted, into an intentional, triumphant 2019. Happy New Year!



Reanna  
Founder, Collective Reach

## “sometimes you win, and sometimes you learn.”

The middle school in my district recently posted this on its sign outside. I'm a recovering perfectionist, and failure has been the bogeyman that has scared me out of going after what I want in life. (Can you relate?) Driving past this sign almost every day served as a powerful reminder: Failure is valuable. If you are willing to risk it and learn from it, it can guide you toward success. So, courageous communicators, here's your first task: Reflect on this past year and **make a list of the times you won, and the times you can learn from.** (*Hint: If you're new to your present role, that's okay. Reflect on what worked and didn't, wherever you were.*)

what worked?	what didn't?
<ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li></ul>	<ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li></ul>
<p>Biggest win of 2018</p> <div style="border: 1px solid black; height: 60px; width: 100%;"></div>	<p>Biggest takeaway of 2018</p> <div style="border: 1px solid black; height: 60px; width: 100%;"></div>

# 2019 organizational goals

Your communications activities should always directly support high-level organizational goals. Bust out that strategic plan. If you don't have one, reference your foundational organizational messaging and purpose: Your mission statement, your programs. Even grant proposals can be a good source for broader goals and objectives. When you can't do it all (*psst...reminder: Really, you can't. I know you wish you could. We all do.*), you have to be able to prioritize your strategies based on which ones better serve your higher "why." So when you're pressed for time and you need to choose between building your email list or making a video series, you can assess which one makes more sense for the big picture. Take a little time to list out three to five high-level organizational goals.

## key strategies

Now, brainstorm some strategies you'd like to implement in 2019 to support these goals. You can include existing strategies you anticipate maintaining/improving upon and new strategies you'd like to test out. Don't worry about limiting yourself yet or getting hyper specific. You can prioritize and narrow down later.

*Some examples: Social media, email marketing, content marketing, blogging, media relations, events, merchandising, employee relations, online advertising, blogger/influencer relations or direct mail.*

Strategy	Target Audience + Objectives	Resource needs/considerations

# monthly planner

Feeling a little excited about some of the interesting things you could launch in 2019? (I'm excited for you!) That heady blend of energy and anxiety at the outset of the year can make it hard to figure out what you can actually accommodate in your limited time. Before you start eliminating ideas (or, my former M.O., building a pie-in-the-sky communications plan that you can only accomplish if you have access to that Time-Turner necklace from Harry Potter), take stock of what opportunities and roadblocks are already built into your year. Consider using different colors or symbols to indicate opportunity vs. roadblock.

**Opportunities** might look like national observances that align with your mission, maybe your organization is gearing up to celebrate a milestone anniversary, or you just know that June is typically a very slow month for your team.

**Roadblocks** might manifest as an entire month your development director will be preparing grant reports and won't be able to provide feedback on time-sensitive projects, or your all-hands-on-deck annual fundraiser won't leave you time to do anything but the bare minimum maintenance.

Of course, there will always be unanticipated opportunities, speedbumps and detours, but plan what you can and you'll make more space to be nimble when you need to be.

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**2019**

<i>January</i>	<i>February</i>	<i>March</i>
<i>April</i>	<i>May</i>	<i>June</i>
<i>July</i>	<i>August</i>	<i>September</i>
<i>October</i>	<i>November</i>	<i>December</i>

# selected strategies

Start to map out what you'd like to move forward with from page two after considering the time available to you this year. I find it's helpful to plan it out either as ongoing activities (for example, weekly blog posts, monthly e-newsletters, quarterly client surveys) or big projects with a clear start and finish, like your annual report, fundraiser or a branding overhaul.

## *ongoing activities*

Activity	Associated strategy	What resources do you need to do this?	Frequency (weekly, quarterly, etc.)

## *big projects*

Jot down big projects and specify if they have a set date or timeframe.


# resources + constraints

## *What do you really need to implement your top strategies?*

Think time, budget, expertise, tools/software, etc. Thoroughly thinking this through can help you figure out the investments you need to make to move forward, may stir some ideas about alternatives that may better fit your current environment, and can serve as a basis for a well reasoned conversation with decision makers about getting the support you need to achieve your organization's goals.

## *What tripped you up last year?*

Look back at the first page and examine where you fell short in 2018. Do you notice any themes or common pitfalls? Maybe you're overly ambitious about what you can get done on your own. Maybe your systems (contact management, content scheduling, etc.) are falling short and causing you to be disorganized. Maybe you have trouble getting timely feedback or decisions from leadership. Where must you direct concerted attention to resolve these issues? What alternatives might there be?

## *How might you maximize your return on investment?*

How can you maximize any additional resources you put toward your organization's communications in 2019? There are many ways to make the most of your budget, from making sure print materials are reasonably evergreen so you don't have to redesign and reprint more than necessary, to developing content that can be repurposed for various channels. Think about how you might design your activities and your investments to work smarter for you.

## *a brighter, bolder* **YOU**

Mission-minded communicators, especially those at smaller organizations, often sacrifice professional development in the name of efficiency. But your personal growth directly benefits your organization. Plus, c'mon: You deserve to become a smarter, stronger, more creative you in 2019. Take a few minutes to think about skills you'd like to master, trainings you'd like to attend or qualities you'd like to cultivate.

## *By December 31, 2019, I want to be... (or have done...)*

*Optional, but powerful, in my experience: I know this sounds a little New Age, but pick a word to serve as your theme for your year to inspire and motivate you. (Mine is "Courage.")*

**WORD OF THE YEAR FOR 2019:**

# action plan

You've celebrated your wins and reflected on where you fell short.

You've considered your big-picture goals and how you might pursue them, bearing in mind the time and resources you can realistically put toward these strategies.

You've taken stock of how you want to grow as a person.

...

## *Now what?*

Your next step might be scheduling a meeting with your manager to talk about how you'd like to approach 2019, or using this to help you begin to build a communications plan. Whatever you do, don't stuff this in a drawer and ignore it. You've uncovered some really useful insights here.

Here are some helpful tips to get you started on next steps:

- Get your calendar in shape. Schedule time to write your plan, and set a deadline for yourself. Now is also a good time to block off recurring times to monitor implementation and catch up on metrics.
- Draft your communications plan. There are many, many formats for communications plans. Find one that works for you (and feel free to tweak it to meet your needs.)
- Secure buy-in and resources for implementation. Your plan will go nowhere if you don't address the resources and constraints you considered today. Talk to decision-makers (or make decisions, if you're it), and figure out how you're going to proceed. Adapt your plan once you've done this so it remains realistic.
- Don't be afraid to launch. Repeat after me: Finished is better than perfect.
- Build good systems and develop self-discipline. It's really, really easy to ignore those calendar reminders when you're busy (or when you know you've fallen behind on implementing your plan.) Don't give into temptation.
- Measure your results, take time to celebrate your successes and plan course corrections when things don't go the way you planned. Nothing is carved in stone. Periodically imagine future you repeating this year planning process for 2020, and think about what you hope to look back on.
- Be sure to sign up for email updates at [collective-reach.com](http://collective-reach.com) to get access to free resources throughout the year to help you reach your goals, grow professionally and connect with other mission-minded communicators.

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Here's one last spot to hold yourself accountable.

Write your next step, and when you'll get it finished, below:

By \_\_\_\_\_ I will have \_\_\_\_\_ so I can \_\_\_\_\_ .  
(date) what you need to do why it's important

Above all else, believe in yourself, know that you are making a difference in the world,  
and have a purposeful, triumphant 2019.

You can do this.

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## FEELING OVERWHELMED?

*get more done with someone who gets you.*

You can DIY, but you can't do it all. If you're considering outsourcing some of your communications work in 2019, consider Collective Reach. From editorial calendars and content creation to project planning, branding and print design, I can expand your capacity so you can extend your reach.

Contact me at [reanna@reannak.com](mailto:reanna@reannak.com) or visit [collective-reach.com](http://collective-reach.com) to learn more.