# DIGITAL ENGAGEMENT FRAMEWORK WORKBOOK

Tools and advice to help you design your organisation's digital strategy

# Introduction

Digital engagement is not a game of luck, it's a game of strategy. Organisations that consistently outperform their competition online have in common that they address their digital media systematically and strategically. We know these organisations for their many followers and fans, successful virals and high digital engagement. If you want to be like them you need a solid digital engagement strategy.

We have developed a powerful tool to help every organisation design a successful digital strategy and reap the benefits of the 21st century: The Digital Engagement Framework.

The Digital Engagement Framework (DEF for friends) lets you discover your organisation's digital potential by asking questions about your target audiences, key assets, organisational vision and much more. The Framework allows you to design campaigns and projects that engage and reach out to people.

The DEF has been developed by Jim Richardson of MuseumNext and Jasper Visser of Inspired by Coffee and is based on years of experience in implementing digital media in organisations. As such, it allows everyone to design a successful digital engagement strategy for their organisation in a team workshop or more individual process.

This free booklet serves both as an introduction to the Framework and as a guide for you to design your own digital engagement strategy. It provides guidance and ideas for those professionals looking to get more out of social media, mobile technology, websites and other digital activities. It's a workbook meant for action and discussion rather than passive reading. As such, we provide worksheets and tricks to use this in your organisation.

Finally, the DEF and this booklet are work in progress. We keep learning about digital engagement with every campaign, project and workshop we do. We gladly share what we learned with you, but are also extremely curious to hear about your experiences. Please refer to the last page of this booklet to see how you can help us, others and yourself by contributing to this project. Thanks in advance!

Jim Richardson

Jasper Visser

# Digital Engagement Framework

## Assets

> What is it that makes you stand out?

> What does your organisation have to offer?

> What makes you unique?

## Outreach

> How can we reach out to new audiences?

> Where do we have to be to meet our audience online?

## Audience

> Who do you reach and who do you want to reach?

> What does your audience look like?

## Content

> Which specific assets will you focus on?

## Activities

> How will you make the connection between your audience and your assets?

## Platform

> Where can you find your audience?

> Which platforms do you use?

## Engagement

> How do we turn passers-by into brand advocates that are highly engaged?

## Ambition

> Why do you use digital media?

> Where do you want to go?

## Goal

> What do you want to achieve?

## Values

> What are the things you stand for?

# Why?

The foundation of your digital engagement strategy comes from answering the why-question. Often we don't ask ourselves why we are on Facebook or why we invest in a mobile app. We'd like to stress that to be successful you need to really understand 'very well' the reasons you are 'online', and what you'd like to achieve with that, under which conditions. We call this your **ambition**, **goals** and **values**.

Ambition is your ultimate goal and focuses on the far future. Often it's a transcription of your organisation's vision or mission statement. Your ambition tells you why to use digital media and where it should take you. Your ambition is bold, inspires people and gets them going. You will discover your ambition if you and your colleagues answer the question, "What will the world say about us in 5 years time, and specifically about our digital media?"

Goals are the tangible representations of your ambition and focus on the foreseeable future. An ambition statement is bold and abstract; goals are achievable and specific. Your digital engagement strategy can focus on anything between 3 and 7 goals you would like to achieve in the coming 3 to 5 years. Remember the best goals are SMART: specific, measurable, achievable, relevant and time-bound. "Using digital media, in the next 3 years, we..."

Values, finally, are about the conditions under which you wish to work online. What are the things you stand for? What is the personality of your organisation? Values focus on the here and now and help you make every-day decisions. Sometimes values are called guidelines or principles. They tell you how to behave and act. Are you proactive, polite, avant-garde or something? You discover your values if you finish the sentence, "My organisation's digital activities should be described with the following adjectives...".

Your ambition, goals and values are not things you can make up on your own. Some of them will be set in official publications of your organisation. Others are shown by the example of directors and senior management. Yet others are part of your organisational culture. Always make sure your coworkers and management share your ideas about the "why?" of your digital engagement strategy, preferably by involving them in answering the questions above.

Ambition

Goals

Values

# Worksheet **1**
# Why?

## **1** In 5 years time...

Where will your organisation be in 5 years time? What will people say about your achievements? How will you be know internationally? Dream big, be brave and determine the ambition for your digital engagement strategy by completing this sentence:

In 5 years time .....

Example: In 5 years time our organisation uses digital media to help our audience develop a balanced view of world affairs, especially in the field of creativity and art.

## **2** Your goals

Which tangible goals do you need to achieve in order to make your ambition come true? Remember good goals are SMART!

1 .....

2 .....

3 .....

4 .....

5 .....

Example: In 5 years time our organisation uses digital media to help our audience develop a balanced view of world affairs, especially in the field of creativity and art.

## **3** Your values

Describe the values of your organisation in short statements. Ask your colleagues for help if you need inspiration for the things your organisation stands for.

Example: Outgoing (we leave our building to reach our audience)

# What?

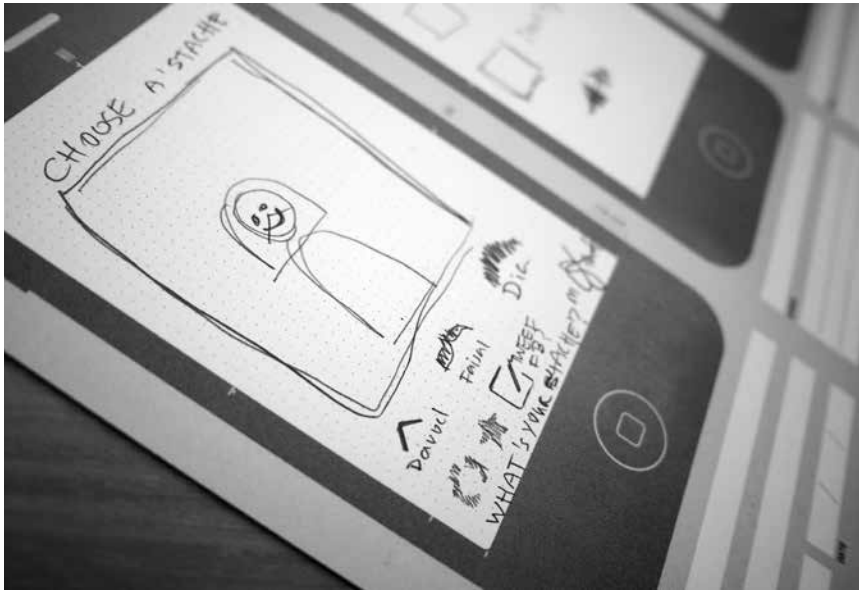
Once you know where you want to go, you'll have to figure out what the activities, campaigns and projects are that will get you there. This what-question comprises two organisation-driven elements (your **assets** and **audience**) and two action-driven elements (**engagement** and **outreach**). Together these four form the bulk of the DEF and the scaffolding for your digital engagement strategy.

The end-result of the what-section is a list of actionable ideas to use your assets to reach out to your target audience and to engage your target audience with your assets. As we'll explain in the next section, this difference between outreach and engagement is central to successful digital engagement. Before we do so, however, let us focus on the organisation-driven elements: assets and audience.

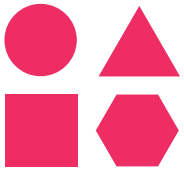
Assets are the things that make your organisation special. Do you have the best café in town or a prime location for first dates? Are your front desk staff the friendliest in the world or your product the most durable? All these things can be assets. Try to be as specific as possible, and as comprehensive as possible, because it will be the assets you'll be 'selling' to your audience. A great way to discover your assets is to go around your organisation and ask all your colleagues (and customers, visitors, etc.) what they are most proud of in their work and your organisation.

Your audience are both the people you reach today, and the people you'd love to reach one day. Of course, we all try to reach everybody, but for the purpose of the DEF such a broad description won't do. Ask yourself two questions: What kind of people are coming through our doors/buying our product at the moment and what kind of people should we reach but aren't we reaching yet? Usually your target audience is described in project proposals or mission statements.

We often use personae to work with the audience. This way we can talk about people such as Bill (the 40-year old father of two) and Kadisha (a talented arts student) rather than abstract concepts such as 'parents with children' and 'urban arts eclectics". To create workable personae you can fill out fake social networking profiles.



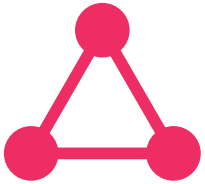

Assets



Outreach

Audience

Engagement



# Worksheet **2**
# Assets and Audiences

## **1** What makes your organisation special?

What are the things your organisation has to offer to its audience? Think beyond your primary product or service when you determine your organisation's assets. Ask your colleagues for ideas, and interview customers and partners about what they think are your assets.

## **2** Your target audience

Who are the people you reach and want to reach with your assets? What do these people look like? Where can they be reached and what are their interests?

Name:

Age:

Bio:

Interests:

Technographics profile:

Social networks:

Technology:

Name: Kim

Age: 37

Bio: Married, 2 young kids, teacher

Interests: Family, online games, day trips

Technographics profile: Critic

Social networks: Facebook, Mumsnet

Technology: iPhone, tablet, laptop

# Engagement versus outreach

**Engagement** and **outreach** are the pinnacle elements of any digital engagement strategy. Although very similar, there's a fundamental difference between both concepts. In our experience this is a key determining factor in success with any digital activity: Does it focus on strengthening relationships with your existing audience (engagement), or does the activity try to make contact with new and fresh target groups (outreach)?

It is very difficult to design activities that address both engagement and outreach at the same time. Also, it is crucial for your organisation's digital success to balance both. Too much focus on outreach might alienate your existing audience, whereas no outreach at all limits your target audience to your existing audience.

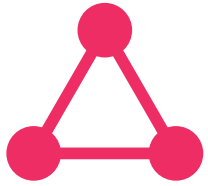
Outreach is about connecting with new target groups that might never have heard of you and are certainly not regular to your place. Outreach activities use your assets to connect with new target groups. For instance, if your restaurant has good coffee and free wifi, you might use this to reach out to freelancers in search of a flexible office. Successful outreach starts with identifying where your target audience is and then setting up activities that make contact with them there. Outreach is usually done outside of the safety of your organisation's building, website and social media presence. Outreach is successful when the target audience knows you exist and acts upon this knowledge.

Engagement on the other hand are all activities that take audiences already connected with you and turn them into enthusiasts for your organisation's assets. Engagement activities go through a fixed number of phases: Great content (see next part) turns contacts into interested customers who you will facilitate, invite and inspire to become engaged. Empowering engaged people and providing them with timely feedback might create enthusiasts. On an average for every 1,000 contacts you'll have one enthusiast. Engagement usually happens within your organisation's building, website and social media presence and is successful when your audience proactively advocates your organisation and its assets.

Obviously, successful activities often start with outreach to get the right target groups involved and then follow up with engagement to achieve set goals.

Outreach

Engagement



# Worksheet **3**
# Engagement versus outreach

## **1** Engaging audiences with your assets

To develop engagement activities, try to make your target audience enthusiastic about one or more of your assets.

Audience(s):

How will you connect with the audience?

What will you do to make the asset engaging?

Asset(s):

Audience(s):

How will you connect with the audience?

What will you do to make the asset engaging?

Asset(s):

## **2** Reaching out to new audiences

Outreach activities leave the safety of your organisation to connect with new audiences. Determine your audience, where they can be reached and which assets you will use to connect with them there.

| Which audience do you want to reach? | Where does this audience go (online/offline)? | Which asset might this audience be interested in? | How will you use the asset to connect with the audience? |
|---|---|---|---|
| | | | |
| | | | |
| | | | |

# How?

At the heart of the DEF are the **activities** you will engage in to make your digital strategy come true. These activities answer the how-question of digital engagement: How will you fulfil your ambition and reach your goals? As we saw earlier, each of these activities is focused either on outreach or engagement. Also, each of these activities combines an asset or set of assets with one or more target audiences. Before we go to activities, however, we need to think about **content** and **platforms**.

The content of each activity is directly related to the assets you determined earlier. Content can take many forms, such as text, photos and video but also interviews, tours and quizzes. Once you know which assets you will use in your outreach or engagement activities, you can determine the content you will need to do so. Online, you either create your own content, or curate other people's content. For instance, content can be photos you shoot of happily working freelancers in your cafe, or comments other people leave about your front desk staff. Especially in engagement activities content curation is at least as important as content creation, as co-creation is often part of the development of your audience.

The choice for one or more platforms for each activity is directly related to the target audiences you specified. Remember the personae? They need to be active on the platform you pick for your activity. Platforms can be more than you think. Of course: your own Twitter, Facebook and Pinterest, but also your website, campaign sites or mobile apps. And don't neglect platforms maintained by others such as Wikipedia, forums or newsletters and Facebook pages of local communities. Especially for outreach activities the choice of a platform maintained by somebody else is essential, as the target audience will usually not be active on any of your own platforms.

Finally, activities are the operational outcome of your mix of content and platforms to create engagement or outreach. An activity is usually a straightforward statement such as "Every week one of our front-line staff will blog about a positive customer experience on our official blog, which we will tweet and share on Facebook" but can be more complex, such as "The marketing team will proactively seek out external platforms where young professionals discuss family planning and engage in their conversations with occasional links to our collection."

Content

Activities

Platform

# Worksheet **4**
# Assets and Audiences

## 1 Which content do you need?

Look at the engagement and outreach activities you designed earlier. Which content do you need to make them happen? Think about video, text, etc. and whether you have it at hand or need to produce it.

Example: Video of live debates, cut in 2-4 minute Q&A parts. Videos are available, cutting in parts needs to be done by editorial team.

## 2 Platform guide

Which platform will you use for what activities? Fill the table below with the information from the earlier worksheets.

| Platform | Priority (high, medium, low) | What will you do on this platform (per activity) |
|---|---|---|
| Your website | | |
| Facebook | | |
| Twitter | | |
| Instagram | | |
| Pinterest | | |
| You Tube | | |
| Flickr | | |
| Blog | | |

# Bring it all together

Before you jump to action with the activities you've determined, please take a moment to step back and look at the whole picture of your digital engagement strategy. By filling in all the elements of the DEF you've created the blueprint for your digital strategy. Now comes the hardest part: making it perfect. Don't worry, often it takes many turns before a strategy is perfect, so take your time for this phase. To see if everything fits together nicely, there are three question you need to ask yourself now:

## Does each individual activity strive towards one or more of the goals you specified?

It's OK to do things just for fun, but if time and funds are limited you might want to focus your efforts on the activities that actually help you achieve your set objectives. Of course you also need to consider the opposite: Have you assigned activities to all the goals you specified? For how else will you make them come true?

## Are the combined activities enough to reach your ambition?

This is maybe the pinnacle question to manage expectations, and it usually starts by asking yourself "Will this really make me...". Quite often the initial answer is either doubt or a clear "no". That doesn't matter. Creating a world-class digital engagement strategy is an iterative process. When in doubt or answering "no", immediately follow up with the questions, "So what else do I need?" and "Can I change one of the activities slightly to get closer to our ambition?".

## Do all your activities acknowledge your values?

Finally, nothing you do should be against your key values. If you are a knowledge leader and one of your values is intellectual integrity, you might want to reconsider the poorly researched opinion pieces on your corporate blog. Using your values as a checklist against all your activities will strengthen them, but also make them more in unison with each other and your organisation's overall mission and vision.

It might take some time, but after some improvement you will answer "yes" full-heartedly three times to the questions above. All that's left is copy-pasting (and slightly editing) your results on your organisation's letterhead and mailing it to leadership. Expect tough discussion and be open to defend and adjust your plans, but we're pretty sure you at least have a solid strategy.

# Where to begin

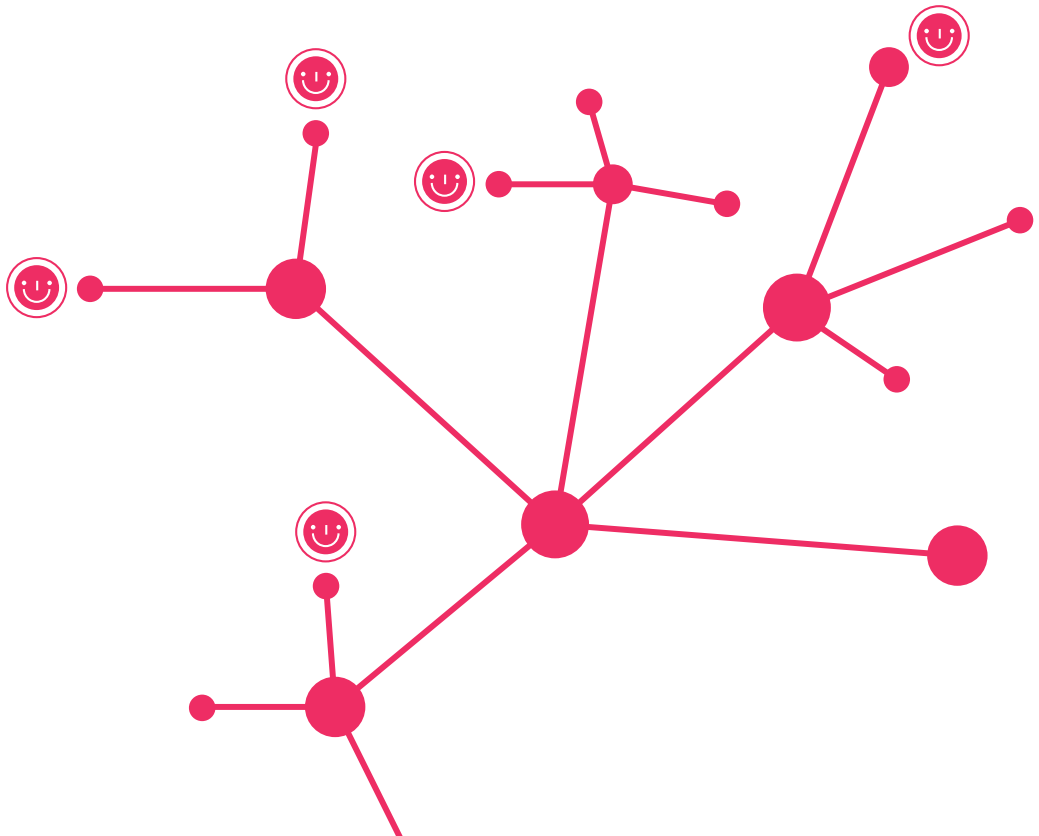
Chances are you read this booklet, scanned the worksheets and by now can't wait to begin with a digital strategy. Only, where to begin? And how much time does this take? In our experience, creating a solid and successful digital engagement strategy is quite some work. If you ask us, we say you need at least 40 hours of your time for a first draft, and another 40 to get it perfect and approved by your management. We recommend you start with the steps below and use the worksheets in this booklet to move forward.

1. Make a large print of the DEF (or draw it yourself) on the wall of your office.
2. Buy (or get your hands on) sufficient post-its and small pieces of paper.
3. For the elements ambition, goals, values, assets and audience you can hand out the post-its and pieces of paper to all your colleagues and ask them to write down their ideas. One element at a time, one idea per post-it.
4. You can use affinity mapping to combine the ideas of your colleagues and then categorise them. This will help you discover trends and – if done with your colleagues – triggers discussion.
5. For engagement and outreach you might want to ask some close colleagues to use the input on the wall to come up with ideas. Do this in a short session.
5. With these ideas, try to puzzle out the how-part of the DEF yourself.
6. Use the colleagues who helped you with engagement and outreach to cross check everything at the end to see if there's a consistent and solid strategy.

If all fails, you can always consider dropping us a note to help you out. From a quick reply to your email, to workshops and masterclasses, to an individual process: we're here to help and support you where needed. But please, don't give up too quickly! The digital success of your organisation depends on you.

# Share with us

As we said in the introduction, the DEF and this booklet are work in progress. Although we've based our ideas on the work we did for many clients and in-depth case studies, we're looking to improve our methodology all the time. You can help us out with that.



Please share your experiences with the DEF with us, for instance by mailing us your filled-in Digital Engagement Framework or giving a case study of one of your activities. You can easily do this by email. Please indicate if you don't want your work to be shared by us with the larger community, for instance on our blogs or at the conferences we speak at.

We plan to continue our work on the DEF, which should accumulate in a full book on the topic which uses your case studies to show successes and challenges with digital strategy. By sharing your experiences with us you have the opportunity to see your name (and your organisation's name, of course) in print as a best practice.

Also, please send us your regular feedback on typos, logical errors or anything else you'd like to tell. We promise we'll respond. Fastest way to reach us:

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Thanks in advance!

# Acknowledgements

We are greatly indebted to the many colleagues, clients and partners we worked with in the past years who have helped us shape our understanding of digital engagement, especially in non-profit, NGO, cultural and educational settings. This includes many great international speakers we cannot begin to name. If you see your ideas reflected anywhere on these pages, we probably got them from you and are hugely thankful.

A special mention should go out to the creator of the Business Model Canvas, Alexander Osterwalder, who has shown us that complex ideas can be modelled into easy frameworks. Careful readers will recognise the resemblance between his canvas and our framework, not so much in content or contexts as in the structuring of thoughts.

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