COMMUNICATION CAMPAIGNING

EXPERIENTIAL ACTIVITY BOOK

FIRST EDITION

DEPARTMENT OF COMMAND, LEADERSHIP, AND MANAGEMENT

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Communication Campaigning

Experiential Activity Book

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Tom Galvin

Department of Command, Leadership, and Management

School of Strategic Landpower

U.S. Army War College, Carlisle, PA

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Comments pertaining to this book are invited and should be forwarded to the Department of Command, Leadership, and Management, School of Strategic Landpower, U.S. Army War College, 122 Forbes Avenue, Carlisle, PA 17013-5240.

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How to Use This Activity Book

The purpose of this Activity Book is to provide a series of experiential exercises that allow readers to construct communication campaigns as described in the monograph *Communication Campaigning: Primer for Senior Leaders.* This workbook is to be considered a living document that will be continuously updated, and therefore there may be differences between the activities herein and their presentation in the companion monograph. The intent is for the two texts to co-evolve over time through usage and feedback. This draft is aligned with the U.S. Army War College resident elective course LM2249: Organizational Communication and the U.S. Army War College's Certificate Program elective of the same name, coded as DE1450 (as of January 2021).

This Activity Book helps provide experiential learning opportunities for the analysis of an organization's standing campaign and the development and implementation of a named campaign. Each activity provides a series of guided questions that allow readers to examine any organization in its environment and develop recommended approaches to correcting deficiencies such as gaps and inconsistencies in messaging, correcting relationships with other audiences, or addressing criticisms or competing views. Many questions will be challenging to answer as they involve abstract concepts and what is in the minds of individuals and groups. These activities should not be treated as 'once and done' affairs. Instead, readers should reflect on the results and reconsider the analysis of previous activities.

This "How To" segment introduces the central constructs used in the book and recommended approaches for both field and educational use.

The 'Communication Campaign'

Communications campaigns support of an organization's *narrative*, defined in the Oxford Dictionary as "a representation of a particular situation or process in such a way as to reflect or conform to an overarching set of aims or values." Communication campaigns guide how organizations as whole promote, defend, and adapt their narratives for a specified purpose, while targeting other organizations and their narratives.

The campaign is a metaphor, a symbol to represent the whole organization fighting to accomplish a mission or purpose. Yet, the campaign is composed of hundreds or thousands of interdependent but often conflicting or chaotic activities. The campaign metaphor allows leaders to think strategically about the desired effects on the environment, rather than overemphasizing measures of performance. It recognizes that the whole organization communicates, thus the campaigns provide vision and strategic direction that the whole organization can use without unduly constraining or limited communication. Finally, the campaign is a multi-level construct that permits nesting of subordinate campaigns, relying on trust vertically up to stakeholders and down to the individual member, and horizontally across all other actors and audiences that the organization communicates with.

The US military often applies the campaign metaphor to strategic-level activities such as combat operations and major transformational change efforts. Divisions of labor and coordination mechanisms help guide the total effort toward a campaign objective. Senior leaders also evoke the campaign metaphor to communication, such as a marketing campaign to attract recruits or to promote important organizational values. Such campaigns, whether named or not, allow leaders to establish a purpose for communicating, an end-state, and ways and means of engagement for spreading the intended message and monitoring for the desired effects. Employing the metaphor will help simplify the process of developing communication campaigns in this workbook by military leaders.

"Standing" and "Named" Campaigns

The campaign metaphor has its limits, however. Organizations are always communicating regardless of the presence of on-going deliberate communication efforts. Organizations have enduring opposing messages facing them, their audiences change little or

evolve slowly, and many of its processes and systems for communicating are already embedded. In effect, the organization is constantly campaigning – to garner resources, promote itself, or fight for survival. This is what I call the *standing campaign* (see Figure 1*). Standing campaigns explain the organizational context as the sum of the answers to four questions. The first, regarding the organization's narrative, seems straightforward but really is not. In fact, many organizations fail to properly identify and leverage their own organization's narrative, and consequently become reactive and ineffective in delivering a unified, coherent, and consistent message.

The second question regards the opposing narratives that the organization faces. This too sounds easy – just monitor everything bad that is said or done about the organization. But those are mere messages. If the organization only responds to messages, then the organization is not being efficient or proactive. Counternarratives constitute the story behind the opposing messages. Understanding how counternarratives form can help organizations be more proactive.

The third question, "who is the organization communicating with?," regards internal and external audiences. Organizational leaders intuitively know that their organizations must communicate deliberate messages to a wide range of audiences. But audiences differ greatly in character, composition, and priority, often changing depending on a particular message the organization wishes to deliver. Moreover, the history of the organization plays an important role in the relationships between the organization and the audience.

Finally, there is the fourth question regarding how the organization does communication. What is its culture? Many strategic communication products, including those from the Department of Defense, emphasize the process of communication, but typically treat it as a top-down means for achieving a campaign's end. Not enough attention is paid to the cultural aspects of communication that make coordinating and synchronizing messages difficult.

Standing campaigns are subject to the dynamics of complex adaptive systems. They require energy to be sustained, or the organization weakens. But such energy is limited and cannot be applied everywhere at all times. Therefore, leaders initiate concerted efforts to direct organizational energy to sustaining or changing the narrative so the organization can survive. I call these named campaigns, because they commonly have a name or moniker to identify them, or can otherwise be identified as a bounded effort separate but connected to the standing campaign.

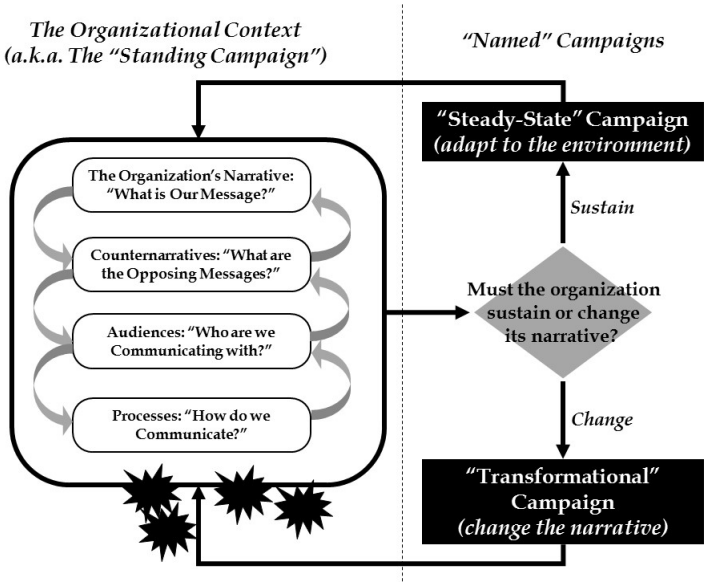

Figure 1. Standing and Named Campaigns

Named campaigns begin when the organizational leader initiates a deliberate effort to sustain or change the organization's narrative. The idea behind the campaign is to take this context and apply it toward a particular requirement. This could include organizational change efforts such as adding a new capability or right-sizing, campaigns of awareness such as the Combined Federal Campaign or combatting military suicides, or campaigns to improve relationships or pursue strategic interests such as

* Figure 1 is an original graphic by the author.

the controversial standing up of U.S. Africa Command in 2007. As a result of this campaign, the context changes – how the organization sees itself, its relationships with others, and its internal ways and means of communicating all change.

The question becomes how much does the leader intend to change the narrative? Is it incrementally, such that the organization's context only experiences natural evolutionary change? Or is it significant, such that the campaign causes the organization to become completely different – with whole new capabilities or the shedding of old ones, or an entirely different mission or purpose? This suggests two different characters of campaigns, with one being far more disruptive than the other. The less disruptive, evolutionary campaign is called a *steady-state campaign*. In steady-state campaigns, organizational energy is applied to allow the organization to adapt its narrative and sustain its competitive advantage. The more disruptive, revolutionary campaign is the *transformational campaign*. Transformational campaigns are far more complex and difficult because the organization must alter its identity – involving an often challenging process of letting go of deeply-held beliefs and practices, overcoming uncertainty, and adopting a new identity.

Structure of the Book

This workbook is divided into two parts with four Activities each, scoped for field and educational environments.

Two Parts – Standing and Named Campaigns

The first Part allows the reader to capture the organization's on-going standing campaign. The four Activities cover, the organization's persistent narrative, counternarratives in the environment, audiences with whom the organization always interacts with, and the internal communication processes. These provide knowledge about the organization that will apply to any named campaign, so long as the standing campaign information is kept current.

The second part regards the development of a named campaign. The four Activities allow the reader to capture the leader's intentions for the campaign, conduct pre-launch planning, launch planning, and post-launch sustainment planning of the campaign through to termination.

Two Levels – Full-Form and Short-Form

Each activity can be performed in field and educational settings. Organizations conducting analysis of its environment and developing a named campaign should use the full activity, performing all steps therein as applicable. There is no specified amount of time to complete the activities as it will depend on the fidelity of available information and the amount of added research required. It can be assumed that some activities may take weeks or months to complete fully. Condensing the timeline is an organizational decision, with the associated risk of incomplete or incorrect information.

For educational settings or situations where the full-form activities are impractical, readers may opt for the short-form. These are identified throughout the workbook as a subset of steps in each activity marked with a star (★) and supplemental instructions, each intended to be completed is under two hours (some in as little as twenty minutes). The short-form skips some steps and reduces the complexity of others (e.g., calling for bullets rather than prose) to meet this time target. Educational settings, where time limits are salient, should therefore consider using the short-form. In field settings, the short form provides an efficient way of producing a rough draft or first look. However, it is important not to overlook or ignore the skipped steps as the questions posed are still relevant.

Activity One: Constructing the Organization's Narrative

What is the story of your organization? Like people, organizations have stories that define who the organization is, who it considers to be its desired members, and what image it projects to the environment. Although there are many discrete stories to be told about the organization, there is one root story that encompasses its full history. Although no one individual member may be aware of the full story, others (especially opponents) may remember it, or misremember it, for the purposes of furthering its own interests and engaging in competition.

An organization's standing campaign is rooted in its own history. It tell the story of the organization from its beginning (as an idea – before it was even formed) to the present, and the story continues to grow until the organization ceases to exist—and may continue on through the memories (real and imagined), whether of former members or others who only heard of the organization having existed. The story captures the organization's evolving purposes from why it was formed to why it remains in existence at present. How has its mission, organization, and resources changed? What it has done well or poorly? What crises or changes it faced and how it responded? How does the organization as a whole interact with its subcomponents or members? What lessons did it learn? What mistakes does it habitually repeat?

Because it is neither possible nor typically necessary to reconstruct the full history, this initial activity provides a shortcut – a set of questions that help you construct an approximation. This approximation is constructed using two key components – the organization's identity and its projected image.

It is often too easy to take the organization's story for granted. You may presume to know who the organization is based on your own personal experiences with it, filling in the blanks with your own suppositions. But how well do you really know your own organization?

Why does this matter? Because others either know the full story of the organization better or are willing to fabricate parts of the story to suit their own needs. You may insist that the U.S. military is a professional organization that maintains strong values and has long histories of success on the battlefield and developing its people to be the best versions of themselves. *They* may counter with any number of counterexamples where the organization neither lived up to its values nor treated its members as espoused. Their opposition could be based in objective truth or outright disinformation, aimed at discredited the organization. How will you be able to tell the difference?

Unlike traditional military campaigns where the enemy situation is developed first, communication campaigns depend on an accurate accounting of the friendly situation before delving into the opposing messages. After all, opposing messages must oppose something – what is it, precisely? Is it truth or based on a fiction?

This Activity sets the foundation for all other activities that articulate the organization's standing campaign. The organization's full story—its *narrative*—is at the center. It tells not only what the organization espouses but also what it enacts. In short, the organization's narrative is the *full story* of the organization, warts and all. By approximating that story in this activity, you will be better postured to judge what the perspectives of others (the counternarratives – Activity Two) are based on, objective truth or urban legend.

The Organization's Narrative

A *narrative* is "a representation of a particular situation or process in such a way as to reflect or conform to an overarching set of aims or values."[1] Narrative is an *artifact*[2] of the

[1] Oxford Online Dictionary, s.v. "Narrative."

[2] As defined by Edgar H. Schein, *Organizational Culture and Leadership*, 4th Edition (San Francisco: Jossey-Bass, 2010), 17-19.

organizational culture, stemming from the underlying assumptions to provide the rationale *why* the organization says and does things certain ways. When members speak or act in alignment with the narrative, the communication is more natural and the members will be more effective at communicating. When they do not align, members may get uncomfortable delivering the message, and the receivers will notice.

The challenge for leaders is capturing as much of the narrative as possible. It is difficult to do, because organizations rarely have its full narrative documented and neatly available in a repository, and members will be inconsistent when telling their versions of it. In military organizations, leaders often have little first-hand experience with the organizations they lead, and have limited available time to reconstruct the narrative by themselves. Fortunately, the narrative is composed of the most salient parts of the organization's story and there are ways of identifying what members and external stakeholders consider to be salient. By capturing these elements, leaders can build an approximation of the narrative sufficiently useful to assess and adjust the standing campaign.

The narrative (Figure 2[3]) has two components, as the Figure shows. The first is the *organizational identity*, which is how members answer the question, *who are we?*[4] The second is the *organizational image*, how the organization projects itself to the environment. These components present a number of claims that members of the organization make, claims of who the organization is, and why the organization is superior (or inferior) to other organizations.[5]

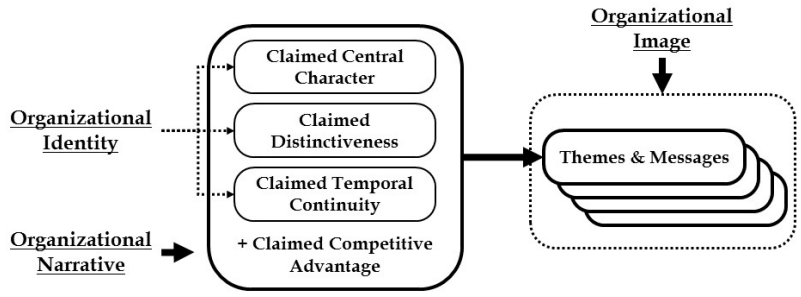

Figure 2. Constructing the Organization's Standing Narrative

Determining the Organization's Identity

Albert and Whetten (1985) established three types of organizational identity claims:[6]

- *Claimed central character.* This constitutes an organization's avowed essence. The U.S. Army, for example, describes its central character as a "profession of arms"[7] and has incorporated it into published doctrine, statements of leaders, human resource management systems and process, and professional military education.

- *Claimed distinctiveness.* This separates one organization from others like it. Each of the services can claim to be within the profession of arms, but the U.S. Army separates itself through its unique "contribution[s] to America's [L]andpower,"[8] while the other services do likewise for their chosen domains (e.g., air, sea, space, and recently cyber).

- *Claimed temporal continuity (i.e., its connection with history).* The organization's identity should remain persistent, meaning little changed over time. It should not undergo continuous transformation, although some evolution is appropriate and expected. The U.S. Army draws heavily on its long history of heroism and victory to celebrate excellence, sustain morale, and attract new members.

Collecting these claims provides a reasonable start for determining how the organization answers the question *who are we*?

[3] Figure 2 is an original graphic by the author.

[4] Stuart Albert and David A. Whetten, "Organizational Identity," *Research in Organizational Behavior* 7 (1985): 263-295.

[5] The relationship of identity and image stems from Hatch & Schultz, Figure 2 (p. 995).

[6] Albert and Whetten, "Organizational Identity," 265.

[7] Raymond T. Odierno, "Foreword: The Profession of Arms," *Military Review* 90, Special Edition on the Profession of Arms (September 2011): 2–4; and Department of the Army, *The Army*, Army Doctrinal Publication 1 (Washington, DC: Department of the Army, November 2012) (hereafter, *ADP 1).*

[8] *ADP 1.*

However, Albert and Whetten also address some implications and caveats. For example, many organizations are hybrids of a sort. Consider combat engineers for example. They draw some of their identity claims from being a military organization and some from being an engineer organization. While these may overlap, there will be differences and members may see themselves as more military or as more engineer. Where these identities come into direct conflict is important, as it also presents a claim to the organization's central character. In other words, a legitimate claim is *we are both military and engineer and we respond to tensions in this dual identity by* _____.

It is also important to capture how the identity has changed over time. For example, units in World War II were different in their character than the same-named units today. What caused the changes in identity and how did the organization cope (e.g., from draft era to all-volunteer, from conventional to today's unconventional warfare, from based in one location back then to a different location today)? How did the organization cope with other potential changes to its identity, such as in the face of new technologies or diversity and inclusion? Is the organization young and growing, and therefore still forging its identity? Or is it maturing and potentially retrenching such that changing the identity is going to be difficult?

Determining the Organization's Image

Of course, what the organization espouses is important, and the degree to which the espoused and enacted values says a lot about how the organization views itself (self-image) and how the organization believes others view it (construed external image). These varied perspectives will be used to develop how the organization externalizes its identity.

Determining its Comparative Advantage

A military organization's sense of competitive advantage plays an important role in its communication. Military organizations prefer to communication from positions of strength, espousing how they are superior to its competitors (e.g., other militaries) or superior to its predecessors (e.g., endowed with better capabilities than in the past). Claims of competitive advantage are a proxy for actual advantage demonstrated in a real war.

Military preparedness literature provides various descriptors of comparative advantage.[9] These provide the adjectives and adverbs to describe the impact of a problem in terms of the military's potential abilities to fight and win on the battlefield. Alternatively, these can also allow organizations to articulate their comparative disadvantages against a competitor or against itself at an earlier time (e.g., after a downsizing or under resource constraints that reduce current readiness). Eight categories of comparative advantage are presented here:

- *Aligned with Assigned Roles and Missions* – How well or poorly does the organization's mission and structure match what is actually needed to fight and win? A problem of alignment is when the organization has the wrong capabilities with which to fight – like having horse cavalry when armored cavalry was becoming common.

- *Overmatch (or Qualitative Superiority)* – Does the organization lack a capability that it needs to fight and win against anticipated opponents, or do they have overmatch over the organization? Modernization brings new materiel capabilities to sustain such overmatch, but there is also a human dimension. Leader development, education, resiliency and fitness also provide overmatch.

- *Sufficient (or Quantitatively Superior)* – Given a capability, does the organization lack capacity—manpower, materiel, information, etc.--to fulfill its responsibilities? Numbers of ready units provide only part of the answer, which includes how many of them can deploy

[9] These are derived from the eight *principles of preparedness* discussed in Thomas P. Galvin (Ed.), *Defense Management Primer*, 1st Ed. (Carlisle, PA: Department of Command, Leadership, and Management).

where needed to influence the situation and seize initiative.

- *Adaptable* – To what extent is the organization ill-structured, equipped, trained, and ready to handle uncertainty, or the requisite variety of missions it may face? It is a potential problem if, during the fight, the organization finds itself incapable of realigning or restructuring its capabilities as required to sustain comparative advantage.

- *Interoperable* – Does the problem indicate an inability to plug-and-play with others, internally or externally? Is the organization inhibited from assembling capabilities into tailored force packages for employment? Is the organization unable to add or subtract capabilities with minimal disruption to those employed? Can the force package interoperate with external entities, such as other government agencies or allies and coalition partners? Interoperable organizations maximize the strengths and minimize the weaknesses of its parts.

- *Mobilizable and Sustainable* – Can the organization respond to a mission requirement as quickly as needed? This can include assessment of the qualities and locations of available facilities, infrastructure, outsourced capabilities, logistics, and other critical support for operations. It also addresses surge capacity to set the theater and project national power.

- *With Foresight* – How well does (or can) the organization balance short-term with long-term requirements, such as ensuring proper manning and equipping for today while continuously modernizing for the future? This principle speaks directly to risks associated with trading current unit readiness for modernization. Balance is critical.

- *With Will to be Prepared* – Is the organization lacking the resources or access to national resources such that it is unable to be prepared? Or, is the organization signaling to adversaries that the organization is in any way unprepared to fight and win and appears unable to become prepared?

Identifying the Corporate Identity

The corporate identity are the key symbols that the organization uses to promote itself. Military organizations use heraldry, insignia, ceremonies and rituals, and similar symbolism to promote itself. The intent is for the symbols to carry the identity and image of the organization to others without the need for re-telling the organization's story.

Identifying the Organization's Reputation

The third element is reputation, which we will approximate from the organization's own perspective. In other words, how does the organization think others perceive it? This will likely differ from the counternarratives that others actually use against the organization (these will be developed in Activity Two). This construed image contributes to what the organization espouses in the environment.

Using the construct of Meyer & Allen (1977) and related literature, here are three major components to reputation:

- *Being Known.* To what extent is the organization known? This is measured in terms of familiarity of the organization by others. Have they heard of it? Do they recognize the symbols, logos, or other corporate identity? Organizational leaders are likely to overstate the degree to which their organizations are recognized in this fashion, so it is useful to consider objective means of determining brand recognition.

- *Being Known for What.* It is important to distinguish brand recognition from the specific things that the organization is best known for. One ordinarily desires for this to be similar to the projected image – that is, what the organization externalizes is what others perceive. However, that might not be the case. Perhaps the organization is better known

for past performance or prior goods and services provided rather than the present. Or, the organization is known for errors, crises, mistakes, criminal actions, or other negatives rather than the mission and purpose it serves. For present purposes, it is again important that this be objectively determined, as competitors may be sowing discordant views of the organization.

- *Affective Attachment.* How well is the organization liked, or viewed favorably? Again, this must be determined objectively to avoid conflating being known with being liked.

Constructing the Narrative

Each of these frameworks provide ideas and data points for understanding various ways that the organization interacts with the environment. But they are just data points – they do not comprise a narrative. It is important that the leader make sense of the data and apply meaning to it in the form of a prose statement that connects everything together in ways that help explain the organization's behavior over time.

The resulting story will naturally be a summary or mere excerpts of the organization's history. This is to be expected, as much of the full history is not salient for constructing the standing campaign. What is salient is sufficient detail to look backward in history and to be predictive about how the organization might respond to new stimuli or new conditions in the environment.

Structure of the Activity

As with all activities in this book, there are full- and short-forms. The full-form is designed to produce a comprehensive story of the organization from its origins to present, that is relevant for current purposes. It is up to the reader to determine which aspects of the organization's story can be excluded – such as former capabilities or structures that do not in any way influence the narrative as presently seen. However, the general rule should be to include as much information as possible, no matter how irrelevant it may be at the present. Readers should also take an iterative approach as more information comes to light. Continuation sheets are encouraged.

It is important to avoid conflating the organization's standing narrative with those of subordinate organizations. While there will be natural overlap because the subordinate history is part of the larger organization's history, they do represent distinct identities.

The short-form of this activity reduces the scope to representative samples of each type of information to gather. Students or readers should focus on the information that best represents both the internal and external perceptions of the organization. This is especially true for organizations whose history is long and tradition is strong, as the identity of the organization is deeply rooted and therefore very challenging to change.

The final organizational narrative (step 4b) should be put into prose and told as a story – of formation, growth, change, and adaptation. Again, it must explain the past while forecasting the future. If the analysis is correct, the organization's behavior will be determined largely by its identity, and will rebel in some way against stimuli that threaten that identity. While step 4b is skipped in the short-form, it is still useful for students to consider how to tell the organization's story *as a story* to others.

Conduct of Activity One: Constructing the Organization's Narrative

For the short form of this activity, complete items marked with a star (★) – steps 1, 2a-c (reduced), 3a, and 4a.

★ 1. Name the Organization and Provide its Mission and Stated Purpose:

Note: This organization should remain consistent through Part One. It is important to answer all steps in this Activity from the perspective of this organization and avoid adding perspectives from parent organizations or industries. For example, if you are choosing a service (e.g., U.S. Army), do not answer any question using perspectives of the Department of Defense or the joint community above or any of its subordinate commands and units below. Answer strictly from the service's perspective.

2. List All Organizational Identity Claims:

For the short form of this step, provide only one or two bullets for each item marked with a star (★).

★ 2.a. Using Albert & Whetten's construct, identify claims by the organization about its *central character*. What defines the organization in the minds of leaders and members? Include both positive and negative claims.

★ 2.b. Identify claims about its *disctinctiveness*. How does the organization differentiate itself from other organizations? These do not need to be organizations of the same type – military organizations may stake claims of distinctiveness against other professional or public sector entities, societies, private sector companies, etc.

★ 2.c. Identify claims about its *temporal continuity* or *history*. Consider the following:

- Why was the organization formed? (Use either objective truth or member claims)
- What were the major phases that the organization underwent when its identity was forged or transformed? What remnants of identity were abandoned? What remain?
- To what extent does the organization remember or intentionally forget its past?

2.d. If the organization has a dual identity (see text for an example), to what extent does the duality present challenges to the organization's self-concept? How do leaders and members reconcile the dual character?

3. Describe the Organization's Image:

For the short form of this step, provide only two or three bullets for each item marked with a star (★).

How does the organization project itself into the environment, and what is its perceived reputation? Answer the following questions.

★ 3.a. What are the organization's claims of comparative advantage or disadvantage over: (a) other organizations, or (b) itself at another point in time (e.g., compared against a 'glorious past')? Use the following measures of competitive advantage:

- *Alignment*. That the organization is better (or worse) suited for the environment than the 'other'
- *Overmatch*. That the organization has capabilities the 'other' doesn't (or vice versa)
- *Sufficiency*. That the organization has greater (or lesser) capacity than the 'other'
- *Interoperability*. That the organization is better (or lesser) able to cooperate, coordinate, or interact with other organizations than the 'other'
- *Adaptability*. That the organization is better (or lesser) able to adapt or transform its capabilities than the 'other'
- *Mobilization and Sustainability*. That the organization is better (or lesser) able to generate capabilities it does not have than the 'other'
- *Foresight*. That the organization is better (or lesser) able to balance current needs (readiness) with future needs (modernization) than the 'other'
- *Will*. That the organization demonstrates (or lacks) the ability to take action when necessary than the 'other.' Will includes better strategies, resourcing, and leadership.

3.b. List the elements of the organization's corporate identity. Include symbols, logos, insignia, and other symbolic elements designed to promote the organization on behalf of its members. For each item listed, provide its intended meaning and the extent to which that meaning is understood outside the organization.

★ 3.c. List the elements of the organization's perceived reputation.

- Being Known. To what extent is the organization known externally? Is it known to the desired extent (some organizations may prefer not to be known widely because it can interfere with the mission, while organizations would clearly want to be known very widely)?
- Being Known for What. What is the organization best known for, and to what extent does this deviate from what the organization wants to be known for?
- Affective Attachment. How important is it that the organization is liked? Feared? Respected? What emotions do others exhibit when the organization is mentioned or recognized?

4. Construct the Organization's Narrative in Prose:

Using the data elements collected, construct the organization's narrative – the life story of the organization as seen by its members. Good narratives do the following:

- Provides meaning to the organization's existence – why was it formed, and how has that purpose changed over time?
- Explains the organization's past and present behaviors – presume that the organization's actions and behavior are consistent to some degree with its identity over time, especially periods of crisis or other difficulties that the organization overcame
- Suitably forecasts the organization's future behaviors if presented with novel or unfamiliar stimuli in the environment. What would the organization fight to preserve? How might it adapt?

★ 4.a. Prepare a series of bullet points (3-7 recommended) as the outline for the organization's narrative.

4.b. Prepare the organization's standing narrative in prose form.

4.b. Prepare the organization's standing narrative in prose form (*continued*)

4.b. Prepare the organization's standing narrative in prose form (*continued*)

Activity Two: Analyzing the Counternarratives

Narrative tells the organization's story. Unfortunately, it is not the only version of the story in the environment. In a competitive world, other organizations have their own campaigns with narratives to promote. Their narrative may conflict with or directly oppose yours. While they will certainly promote their narrative, they will also make statements or take actions designed to target your organization – exploiting your weaknesses, gaps, or inconsistencies among your words and actions.

Sometimes it is an honorable competition in which the stronger and more truthful narrative prevails and there is no antipathy; however, this is rarely the case. The stakes may be political, economic, or social, such that "winning is the only thing." After all, there is no prize for second place in an election, and often little consolation for runners-up in other venues. Hence, the competition is intense and often asymmetric, meaning competing narratives may alter the truth or base themselves on misconceptions or falsehoods. At the extreme, they may even be fictions perpetuated to serve the competing organization's aims.

For the purposes of the standing campaign, the focus is on enduring counternarratives that oppose the organization. They may be persistent or they may be cyclic, but they are never actually defeated and can resurface when the opportunity arises. Also, while they are likely to be promoted by opponents, they may be carried and spread by the organization's friends or stakeholders. Counternarratives are therefore audience-independent.

Counternarratives are narratives that exist primarily to "refute other narratives" harbored by organizations, societies, nations, or any other collective group.[1] They often emerge as "stories … which offer resistance, either implicitly or explicitly, to dominant cultural narratives."[2] In the context of organizations, the target is the organization's own narrative – the expression of its competitive advantage.

In addition to being narratives opposing an organizational narrative, counternarratives exist to "open space for alternative narratives to be heard by creating public debate."[3] Counternarratives presents and argues alternatives to the images that organizations are trying to project. They are "agonistic in nature," seeking to expose or draw out contradictions or inconsistencies.[4] The fueling of debate is essential – a counternarrative fails if it does not inspire thought or action in others.

The challenge for leaders is that counternarratives are rarely made transparent in the environment. Instead, they must derive counternarratives from the plethora of opposing statements uttered by or actions committed by others. Sometimes opposing statements will be easy to trace back to a central story. Other times, the statements may shield the true intent. For example, a counternarrative opposing change in an organization may produce messages that nitpick proposed change efforts, denigrate the leadership, or argue for the status quo. The tone of the messages can be rational or emotionally charged. If the counternarrative was specifically against the change effort, perhaps the leader's message can address the concerns and the counternarrative can go quiet. But if the counternarrative is against change in general, appeasement will be more difficult as opponents can draw many discrete messages aimed at different targets and effectively shield their general antagonism toward change.

In the end, organizations cannot afford to spend their limited energy playing *whack-a-mole* against every possible opposing message. What is the underlying attitude or perspective that is fueling these messages, allowing opponents to remain on the offense? And therefore, what

[1] Philip Samuels, *Fahrenheit 9/11: A Case Study in Counternarrative*, doctoral dissertation (University of Kansas, 2007), 24.

[2] Molly Andrews, "Introduction," in Michael Bamberg and Molly Andrews (Eds.), *Considering Counter-Narratives: Narrating, Resisting, Making Sense* (Amsterdam: John Benjamins, 2004), 1.

[3] Samuels, *Fahrenheit 9/11*, 25.

[4] Ibid.

defensive narratives should be organization employ to thwart the counternarratives?

In Activity Three, we will look at the converse – how we use counternarratives against our opponents, and how we hope they spread to other audiences.

Counternarratives and defense narratives take several forms. Some are stories deriving directly from the consequences of the organization's action. Others emerge from presumptions (or fabrications) about the organization's identity. But ultimately, counternarratives will outnumber narratives because of the following two truisms about the strategic environment:

> *Everything an organization **says**, **does**, or **is** can and will be used against it.*
> *Everything an organization **does not say**, **does not do**, or **is not** also can and will be used against it.*

Working Backwards from Messages

The goal is to trace the potential thousands upon thousands of messages perceived in the environment back to their originating counternarratives. Not all counternarratives will be clear or obvious, as audiences may wish to shield their opposition toward the organization. Competitors and adversaries may try to hide their true intentions or overstate them to intimidate the organizations. Friends may not want disagreements aired. Since the counternarrative is in the mind of the audience, the organization must analyze the statements made to derive that counternarrative.

The methods described here below come from qualitative research methodologies that require the analyst to avoid preconceived notions about the resulting counternarrative. One should avoid biasing the result by assuming what audiences are thinking or using one message anecdotally as evidence of the full counternarrative. Opponents may recognize incomplete or faulty analysis because the organization's messaging is likely to demonstrate misunderstanding of the opponents' perspective, which in turn enables further opposition.

The method in the Activity takes messages and collects them into *themes,* which is clusters of messages that have something in common – from the same types of audiences, expressing similar sentiments, etc. Themes do not coalesce into a coherent story. This is because the messages may change as they are shared by audiences or as each actor puts their 'spin' on them. One must not only look at spoken or written messages but also the actions of others and their use of cultural signs, motifs, and symbols.[5] Analysts must examine both the direct content of the words, actions, and symbols plus their underlying meaning to develop themes that identify what the opposing perspective is about and how it contrasts with the organization's narrative.[6]

As themes are collected, stories may emerge. These are the true counternarratives – reflecting the underlying beliefs behind the messages delivered. Like the narrative, counternarratives are prose and present alternative identities and images of the organization. It provides the fuel for opponents to deliver many disparate and seemingly unrelated messages into the environment.

From Messages to Themes

The below are four common ways to identity opposing themes that can help identify counternarratives. These collect messages that express a single common belief that presents an alternative story to the organization's narrative.[7]

- *Discrepant Claims Against the Narrative* – Opponent themes focus on say-do gaps, inconsistencies, and past errors and mistakes by the organization. They generally directly address specific identity or image claims by the organization..

- *Repudiation of the Organization's Existence* – These themes emerge from beliefs that the organization exists for nefarious or hidden purposes, disregarding the target

[5] Wayne Michael Hall and Gary Citrenbaum. *Intelligence Analysis: How to Think in Complex Environments* (Santa Barbara, Calif: Praeger Security International, 2010), Chapter 15.

[6] Johnny Saldaña, *The Coding Manual for Qualitative Researchers*, 2nd Ed. (Thousand Oaks, CA: Sage, 2014), 175.

[7] The below points are all drawn from Hall & Citrenbaum..

organization's narrative. Or, the messages suggest that the world would be better off if the organization did not exist. These can be derived when opposing messages appear scattershot or emotional, or that the opponents themselves appear to be contrarian for its own sake (e.g., nothing the organization does is right, nothing the organization does right is acknowledged).

- *Discrepant Claims by Association* – The messages may be directed at the organization but the actual target may be someone else, such as a parent organization or industry, a similar organization elsewhere, or some other entity with whom the organization has ties. For example, some criticisms directed at the U.S. military are targeting the U.S. as a whole instead. These can emerge among audiences who otherwise might not oppose the organization, but who are willing to view the organization as an example of something else they oppose.

- *Post-Crisis Fallout* – These often follow scandal or crises from which adversaries (perhaps including victims, witnesses, and their followers) emerge fearing or expecting the scandal or crisis to repeat or claiming that conditions leading to the crisis are still unchanged. Such stories present the crisis as indicators of systemic flaws or uncorrected attitudes among members. The counternarrative becomes one of distrust or concern over the organization's ability to avoid or mitigate a future crisis.

From Themes to Counternarratives

Translating sets of themes into a common counternarrative can be challenging, particularly when the source of the counternarrative is not really known. Thus, it is important to consider how the themes are used and what general patterns of opposition to the organization emerge. These patterns should help explain how the opponent is generating opposing messages. What about the organization's narrative are they attacking or refuting? Put in the simplest of terms – is the organization being attacked for what it does or does not do, or for what it is or is not?

These reflect the levels of rational thought or emotion attached to the counternarrative, which is likely also attached to the audiences using it. Figure 3 shows a spectrum of counternarrative intensity from rational (i.e., the organization is error-prone and tends to make mistakes) to fully emotional (i.e., the organization is the embodiment of 'evil').[8] However, just because the messages are perceived as rational does not mean that the counternarrative is rational. For example, if the messages say that everything the organization does is wrong, the counternarrative could actually be more emotional, only being disguised as a rational story.

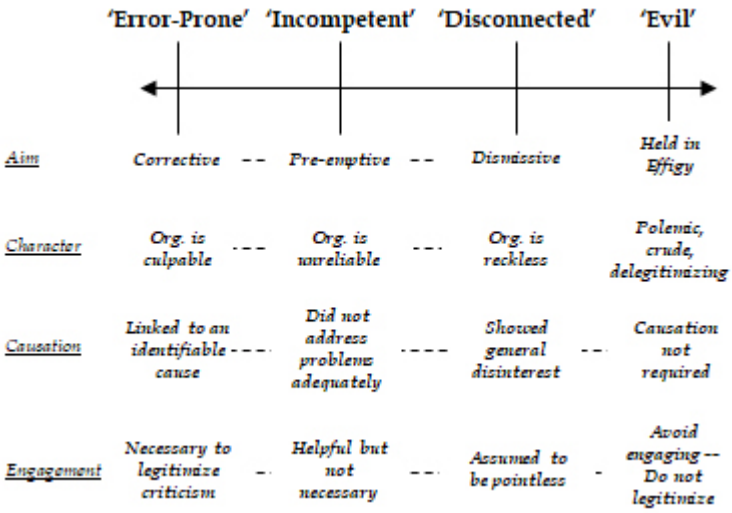

Figure 3. Intensity of Counternarratives

The following represent four levels of counternarrative from most to least rational:

- *Error-Prone* – Follows discrepant claims against the narrative and suggests that the organization is prone to error. Mistakes will be repeated despite the organization's best efforts.

- *Incompetent* – Slightly more emotional. Also uses discrepant claims but may

[8] *Figure 3* is an original graphic by the author

include post-crisis messages. Repudiation is aimed at particular leaders or members rather than whole organization -- suggestings frustration over the organization's performance or direction or loss of trust and confidence in the leaders. Claims that changes are needed to shake things up.

- *Disconnected* – The organization is out of step or touch with the environment. Complaints or criticisms fall on deaf ears (if heard at all). Repudiation themes become more prominent but still accompanied with discrepant claims that opens the door for reconciliation.

- *Evil* - Highly emotional, heavy on repudiation, messages not necessarily connected to reality (or may be intentionally false). Portrays the organization as inherently evil, harmful to others, and taking advantage of any situation to serve its own needs. May reflect desires to see the organization or any of its leaders or members harmed.

Identifying Defensive Narratives

Seeing counternarratives as communicating on the offense—in a team sport sense—allows one to think in terms of a corresponding defense. How does an organization defend itself against a counternarrative? Put another way, how does one construct a story that counters the counternarrative and protects the organization's own narrative from harm?

There are three varieties of *defensive narrative* (DN), a story that opposes a counternarrative. Organizations use defensive narratives to generate messages to counter opposing messages coming from the counternarrative. *Important note: DNs counter counternarratives, not other audiences. Indeed, some DNs are logically combined with counternarratives targeting the opponent, but those are fundamentally different stories!*

- *Refutation* – Takes the most direct route. The story goes that the counternarrative is incorrect (whether factually, thematically, or emotionally), and that anyone following the counternarrative is being duped or tricked in some way. Messages coming from these DNs focus on correcting the record.

- *Mitigation* – Mitigation DNs follow the storyline that the counternarrative is essentially irrelevant, and that the best defense for the organization is to not respond or deflect attention away. It views any form of acknowledgement of the counternarrative as problematic or nonproductive. Mitigation can be compared to the phrase *talk to the hand*.

- *Accommodation.* These DNs acknowledge that the counternarrative is at least partially correct, and the organization is willing to adapt (or even transform itself). However, these DNs usually include some sort of caveat (e.g., *yes, but…*) that allows the organization to accommodate on its own terms and not necessarily those of the opponent.

Individual messages may perform any of these functions, but the DN itself will have only one of these characters. In fact, messages may intentionally mask the DN. For example, an organization may be attacked for its lack of attention on diversity. Defensive messages may include terms related to inclusion (suggesting accommodation) but may actually reflect a mitigation DN by using platitudes in hopes of blunting criticism without addressing the topic.

Structure of the Activity

You will analyze counternarratives against your organization and identify your defenses against them. The full- and short-forms of the exercise differ only in scope -- comprehensive (identifying all active counternarratives) or merely identifying one or two for exercise purposes. You will first trace opposing messages back to one or more counternarratives, and then deduce the defenses the organization currently uses. You will conclude with an analysis of whether or not the defensive narratives have the desired impact. The overall aim is for the organization to isolate the counternarratives, render them discredited and ineffectual such that they do not spread. Remember that counternarratives are never defeated.

Conduct of Activity Two: Analyzing the Counternarratives

For the short form of this activity, complete items marked with a star and follow the special instructions (★) – steps 1, 2a-b, 4a-b and 5a-b.

★ 1. Collect and Organize Opposing Messages:

Use the space below to list *recurring* opposing messages against the organization. By recurring, they may be persistent (i.e., issued continuously) or cyclic (i.e., resurfacing on occasion). They do not have to come only from opponents – allies and stakeholders may issue them as well (e.g., in times of crisis or under conditions where the relationship is under stress).

★ 2. Collect Messages into Common Themes:

Cluster like messages together and identify common persistent themes that reflect enduring or recurring views of the organization that differ from the organization's narrative.

★ 2.a. *Discrepant Claims Against the Narrative*. Such themes reflect a set of disparate messages that target specific aspects of the organization's identity or image, such as its central character or its claims of comparative advantage.

★ 2.b. *Repudiation of the Organization*. Such themes reflect a set of opposing messages that ignore or avoid rational discourse about the organization. The existence of the organization is the target as opponents may believe the organization to be harmful or unnecessary. Rational countering of the messages usually has little effect.

2.c. *Discrepant Claims by Association*. These themes emerge from messages that are directed at the organization, but may actually target something else (e.g., a higher-level organization or the host nation or society). The organization is accused of another entity's sins.

2.d. *Post-Crisis Fallout.* These themes emerge from organizational actions performed while under duress, such as a major crisis. The messages generated during these exceptional circumstances are essentially being applied against the organization under normal conditions, perhaps reflecting a lack of confidence in the organization's ability to address future crises.

3. Analyze Themes to Derive Possible Counternarratives:

3.a. Go through the results of Step 2 and cluster themes to determine if central stories exist that enable audiences (internal or external) to generate and spread opposing messages against the organization, such that the themes represent logical ways that the messages would spread. Indicate which story structure appears most likely:

- *Error-Prone*. That past errors are likely to be repeated because the organization is presumed not to have taken sufficient corrective action.
- *Incompetent*. That past errors are expected to be repeated because the organization is incapable of taking corrective action or is taking ill-advised steps that will make things worse
- *Disconnected*. That past errors (real or perceived) are the result of the organization or its leaders being detached from the situation. Leaders are perceived as apathetic, exerting minimal corrective effort, or otherwise putting their own needs before that of the organization
- *Hateful*. That the organization's reality is irrevelant. Its existence is under question. The organization is seen as harmful to itself, others, or the environment, and nothing that the organization can say or do can change it.

3.b. Draw a picture or a map with these themes to derive the underlying counternarrative – reflect how it explains what the organization alleged is and what it does. Include which elements of the organization's narrative are targeted most. Also, identify if the counternarrative opposes the organization as is (i.e., based on truth) or opposes the organization as opponents prefer to see it (i.e., based on misinformation or lies).

- If the messages involve deliberate disinformation, the storyboard should include the presumed identity and image that opponents would be using and why opponents would use them.

★ 4. Assemble the Counternarratives as Stories:

For the short form (skipping step 3), it is not necessary to cluster themes together – take two themes from Step 2 and prepare one counternarrative for each.

Choose counternarratives above and write them out as a single prose paragraph (space is provided below for three) with the following elements: (1) what about the organization's narrative (see Activity One) is opposed and why, (2) why it is necessary for the counternarrative to persist, and (3) what is the end state desired by the counternarrative?

★ 4.a. Counternarrative 1: Name _____
Story:

★ 4.b. Counternarrative 2: Name _____
Story:

4.c. Counternarrative 3: Name _____
Story:

4.d. Counternarrative 4: Name _____
Story:

★ 5. Identify the Corresponding Defensive Narratives:

For each counternarrative, identify the organization's traditional defensive narrative, in which one of the following characters will dominate:

- *Refutation*. The counternarrative is wrong, and the appropriate defense is to confront the messages directly and those who promulgate the counternarrative
- *Mitigation*. The counternarrative is irrelevant, and the appropriate defense is to avoid acknowledging or discussing it, either ignoring the messages or redirecting the conversation
- *Accommodation*. The counternarrative is partially correct, and the appropriate defense is to acknowledge the correct aspects and undergo some degree of internal change, but on the organization's terms and not that of the opponent.

★ 5.a. Defense Narrative 1: Name _____

Counternarrative Opposed _____

Which type? *Refutation* *Mitigation* *Accommodation*

Story:

★ 5.b. Defense Narrative 2: Name _____

Counternarrative Opposed _____

Which type? *Refutation* *Mitigation* *Accommodation*

Story:

5.c. Defense Narrative 3: Name _____

Counternarrative Opposed _____

Which type? *Refutation* *Mitigation* *Accommodation*

Story:

5.d. Defense Narrative 4: Name _____

Counternarrative Opposed _____

Which type? *Refutation* *Mitigation* *Accommodation*

Story:

Activity Three: Analyzing the Audiences

When senior leaders conduct campaigns, they often have particular audiences in mind to whom they wish to deliver messages. They may be formal organizations such as other federal or state government agencies, private sector businesses, or partner militaries. They may be particular social groups (e.g., ethnic groups, local civil leaders) or professionals (e.g., engineers, scientists). They may also be internal, such as groups of members (e.g., officers, noncommissioned officers, enlisted, civilians) and others of importance (e.g., contractors, family members and other dependents).

However, in an organization's standing campaign, these audiences are generally well-known and enduring. They do not change from one campaign to another. The organization's stakeholders, in particular, do not often change because stakeholder relationships are typical formal – established in law, regulation, policy, and/or resource streams. Other audiences may become more or less salient over time or based on the primary issues at hand, but relationships with those audiences are enduring. Also, the character of those relationships are enduring – it is difficult to turn foe into friend (e.g., win hearts and minds). Many campaigns do not require changes to these relationships. Instead, the aim may be to silence adversaries or keep neutral parties neutral so they don't become opponents.

In this Activity, you will review how the organization defines its audiences and describes its relationships among them. It also includes the converse of Activity Two – what are the counternarratives you ordinary use against other audiences (specifically opponents) and how do they defend themselves against you?

It would be simple if people could be characterized or bucketed neatly into exact groupings and called them discrete audiences. It would also be nice if an audience could be homogeneous – such that your messages to that audiences would be received the same by all its members. Unfortunately, it is not possible. How people self-identify depends on the situation and often differs from the organizational leader's perspective. Individuals can be members of multiple audiences, and their relationships with each can conflict. Also, in today's information environment, people are more empowered to see themselves as audiences of one. They prefer either direct contact or to receive information from those they follow on news or social media, rather than groupings established by the senders.

Your organization cannot build a feasible communication campaign around individuals. Ultimately, the standing campaign exists to allow the organization to promote its narrative. Themes and messages coming from that campaign must naturally be finite, so that the organization can leverage its resources efficiently to promote the narrative. It also means that the campaign has to limit the number of audiences and assume that there's enough in common so that all members of an audience would respond similarly to an organization's message. If the audience is too broad, then there is potential risk that members of the audience will respond differently than desired.

What is an *Audience*?

A *communication campaign audience* (hereafter in this book 'audience') is *a socially constructed collective presumed to read, watch, or listen to the campaign's intended messages in a generally consistent way based on common identity factors relevant to the campaign's goals.*[1] The operative phrase is socially constructed, and the perspectives of senders and receivers of messages may differ. A military officer delivering a speech to community leaders may think of the leaders as a single homogeneous audience, and therefore sends messages relevant for the whole. However, the community leaders may be splintered between supporters and opponents of the military, among rival political parties or groups,

[1] Based on Richard Halloran, "Strategic Communication," *Parameters*, Vol. 37, No. 3 (Autumn 2007), 8.

or mixed on whether the speech touches on an important or unimportant topic. In this case, the officer sees one audience while the audiences sees two or more.

There are two factors to consider when determining an audience – its composition and power over the organization.

Composition: Organizational or Mass

Fewer audiences mean fewer messages to craft. But this necessarily makes some audiences very large and probably widely distributed. It is not possible to reach all members of these audiences equally. Thus, there is a tension concerning the extent to which communicating with a certain part of the audience counts as addressing the entire audience.

From this, there are two different types of audience composition. The first is the *organizational audience* whereby communications with the audience's leaders or representatives approximate engagement with the audience as a whole. The second is a *mass audience,* where the audience is composed mainly of autonomous individuals, such that the audience is less likely to have or employ leaders or representatives. In other words, engaging with a mass audience means engaging with greater numbers of its members and not assuming the message is necessarily shared among them.

The organizational audience is the simpler category – when the audience is itself an organization or a well-defined collection, such as an industry. What defines the organizational audience from the mass audience are two things: (1) the presumption of a decision-making body that exercises power over the organization and its members, and (2) that the desired outcome is organization level and not individual level.

Mass audiences are collections of individuals who are identified by one or more factors. For example, *society* is a mass audience of those people living together in a geographic region. Demographic factors (e.g., defined by age, ethnicity, nation, gender, etc.) can also define mass audiences; and can vocations (e.g., the 'media,' 'academia,' 'defense industries'), communities (e.g., family support groups, church organizations, veterans organizations), and social media users (e.g., Facebook users, Twitter users). The identification of a mass audience is not necessarily mutual. The organization may determine that a particular mass audience exists based on a factor, but that in no way obligates the audience to self-identify the same way. The converse is also true and the audience may self-identify differently from what the organization perceives. Mass audiences may also see organized groups step forward and claim to represent common interests of the audience (e.g., groups representing the interests of ethnic or gender minorities), but the organization must determine the degree to which such groups exercise or maintain legitimacy in the eyes of the mass audience. Such legitimacy is often conferred with respect to specific issues and is therefore temporal.

Power & Influence: Stakeholders and Others

Not all audiences are equal, and those audiences whose power and influence over the organization is greater are generally given higher priority in the standing campaign. Drawing from the work of Stephen Gerras, a *stakeholder* is a "person, group, or entity that can be affected by or influence an organization's action."[2] This workbook divides stakeholders into three levels – *primary stakeholder, [secondary] stakeholder,* and *third party.*

Primary stakeholders have significant, persistent, and broad-based power and legitimacy over the organization, including decision authority (such as legislative or regulatory) and access to resources vital to the organization's mission or critical to sustaining the organization's identity and image.[3] Legitimacy is key; combining it with power over resources and decisions place Primary Stakeholders in substantive positions of authority.[4] Primary Stakeholders are therefore always organizational audiences.

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[2] Gerras, *Stakeholder Management Approach*, 1.

[3] Ibid. My use of *primary stakeholder* mirrors the upper half of Figure 2 in which Gerras describes audience with "high power" over the organization.

[4] Ronald K. Mitchell, Bradley R. Agle, and Donna J. Wood, "Toward a Theory of Stakeholder Identification and Salience: Defining the Principle of Who and What Really Counts," *The Academy of Management Review* 22, No. 4 (October 1997), 860.

Secondary stakeholders (hereafter simply 'stakeholders') are those with sufficient power and legitimacy to affect the organization, but not with the dominant authority of a Primary Stakeholder. Mass audiences (e.g., the "public") can be a stakeholder, and often is for standing campaigns of military organizations due to ordinary civil-military relations.

Third parties can also be organizational or mass audiences. They ordinarily have little or no power or legitimacy in organizational affairs except for: (a) very specific issues by which they can articulate particular expertise, or (b) the demonstrable ability to disrupt the power and/or legitimacy of the organization or other stakeholders. The power and influence third parties wield typically depends on the influence they have on the organization's primary stakeholders. If the primary stakeholder listens to a third party more than the organization, that can lead to resourcing decisions or change in priorities unfavorable to the organization.

Relationships with the Audience

Is the audience friendly or allied? Is it an opponent of the organization? Or is it neutral? Distinguishing friends from foes and fence-sitters can be challenging sometimes. It can change from issue to issue. For example, sometimes the U.S. military services are in competition while at other times they are united under a joint issue. But the organization has a preference – in the absence of specific issues that drive change, the services will *ordinarily* see each other as competitors or allies. That ordinary relationship transcends issues, personalities, etc. Figure 4 shows six different ways of classifying the relationship with an audience based on two dimensions.[5]

The first factor is the *dominant form of narrative*, defined as which type of narrative generates the majority of messages between the organization and the audience. If the audience is friendly, the narrative would dominate as both sides would communicate their shared understandings with each other to harmonize communications with others. Adversarial audiences use mostly counternarratives, spending much of their communication attacking the organization and vice versa. Meanwhile, and neutral relationships mostly use defensive narratives when communicating with each other, largely to avoid provocation while keeping communication channels open. Although organizations may view their primary stakeholders favorably, in practice the relationships are often dominated by defensive narratives. Organizations will prefer to sustain working relationships rather than jeopardize them by being too friendly or too critical, which would expose themselves to risk of losing the stakeholder's support and resources.

Dominant Mode of Communication

Dominant From of Narrative	**Active**	**Passive**
Narrative (Friend)	*Allied.* Parties share much in common. Communication is open and mutually supportive, possibly due to mutual dependence.	*Agreeable.* Parties share much in common, but only communicate when necessary. One party can reach out to the other with limited resistance.
Counter-narrative (Foe)	*Adversarial.* The two parties openly attack each other, whether directly or through third parties (e.g. media). They project incompatible images and often avoid reconciliation or negotiation.	*Competitive.* The identifies of the two parties remain incompatible, but communication is not necessarily hostile. Negotiation is possible, but differences in identity are rarely resolved.
Defensive Narrative (Fence-Sitter)	*Cautious.* Both parties depend on each other in some way but must avoid confrontation, and thus are secretive or mask their true intentions. Parties are ambivalent about the relationship. Often reflects relationships between the organization and its primary stakeholders.	*Deflective.* The parties would prefer not to communicate directly. Any direct contact is viewed as an exceptional case and driven by circumstances. Use of

Figure 4. Six Types of Relationships

The other dimension, *dominant mode of communication*, reflects the tone and intensity of messages between the two parties. *Active* mode is when the organization and the audience prefer direct or unequivocal communication between them. Direct does not necessarily mean face-to-

[5] Figure 4 is an original graphic by the author.

face, but that the intended recipient of the message is made known. Passive mode is when the organization and the audience prefer indirect communication, sending signals to the other party without calling them out. *Passive* communication also occurs when communication is one-sided, meaning that one side communicates directly one way, but the other party responds indirectly.

For foes and fence-sitters, which will comprise the majority of audiences in the standing audience, it is important to recognize what counternarratives the organization uses against them. It is usually easy to identify counternarratives against foes and the defensive narratives they use in reply. This follows the converse of Activity Two. Fence-sitters could be more challenging, especially if it is a primary stakeholder or other audience with great influence. The counternarrative is likely to center on barriers to full alliance, such as general concerns or fears of the stakeholder's power, past instances where the stakeholder failed to support the organization, or gaps and inconsistencies among stakeholder decisions that affect the organization. The dominant defensive narratives with that stakeholder may therefore drive the organization to confront the barriers while setting conditions for future stakeholder decision that are more favorable.

Structure of the Activity

This Activity has three parts – the first is to identify the audiences in the standing campaign in priority order. Next is to characterize the relationships – how are they in practice and what might the organization prefer? Finally, for those audiences others than close allies or friends, what are the counternarratives that the organization uses against them, and how does that audience typically respond?

Conduct of Activity Three: Analyzing the Audiences

For the short form of this activity, complete items marked with a star (★) – steps 1a-b, 2 (reduced), and 3a.

1. Listing the Audiences in the Standing Campaign:

Identify audiences below according to their priorities – primary stakeholder, stakeholder, or third party. Ensure that these are audiences with whom the organization has an *enduring* relationship. Do not include audiences who were present only for one issue and subsequently broke contact.

For the short form of this step, identify at least one primary stakeholder (1a) and 2 other stakeholders for (1b), in which at least one must be an opponent (e.g., adversary or competitor).

★ 1.a. Identify the organization's primary stakeholders. These are *organizations* (not mass audiences) who have legal or prescribed power and influence over the organization and make decisions that determine the organization's strategic direction, available resources, even its continued existence. All organizations will have at least one primary stakeholder but likely no more than two. *List the primary stakeholders and the sources of their power and influence over the organization.*

★ 1.b. Identify the organization's other stakeholders. These are organizational or mass audiences who have some power and influence over the organization, either directly or indirectly through influence of the primary stakeholder. These audiences are likely to have persistent influence. *List these stakeholders, their connections to the organization, and the influence they may over the primary stakeholders.*

1.c. Identify the organization's third party audiences. These are organizations or mass audiences whose power and influence over the organization is issue-dependent, and may be episodic. Their influence is usually more indirect, based on influence over the primary stakeholder. However, third parties can also use communications as a disruptive influence over the organization. *List the third party audiences, the issues which are most salient to them, and the conditions by which they tend to become active in the environment and engage the organization or its stakeholders.*

★ 2. Characterize the Relationships with Audiences:

This step can be performed with all audiences of the standing campaign, or you may choose select audiences (e.g., stakeholders only) if time is limited. Consider the dominant type of narrative used when communicating with them (directly or through others) and consider the dominant mode – is it *active* (e.g., direct and plentiful communication with the audience) or *passive* (e.g., limited communication and/or reliance on indirect means).

★ 2.a. Go back to the lists in Step 1 and use the following codes to assess the relationship:

Dominant narrative:	Dominant mode:
+ for *friend,* promoting narrative dominant	Add ! if active, no mark if passive
- for *foe*, counternarrative dominant	Add ! if active, no mark if passive
0 for neutral party, defensive narrative dominant	Add ! if active, no mark if passive

★ 2.b. Identify the relationships that are particularly challenging for the standing campaign – foes who should (or need to be) friends or at least put on the fence, fence-sitters who need to be off the fence, friends whose alliance is complicated and potentially inhibits the organization. For each, identify the following:

For the short-form, choose the primary stakeholder and the opponent from Step 1.

- The audience and current relationship, and why the current relationship is problematic
- What is the desired relationship with the audience and why? What prevents that type of relationship from occurring?

3. Identify Counternarratives Used Against Foes & Neutral Audiences:

This step can be performed with all audiences identified in Step 2 as a foe (-) or fence-sitter (0), or you may choose select audiences if time is limited. This step is the converse of Activity Two, whereby you will identify counternarratives you use against the identified audience and any defensive narrative they use in return.

For *your* counternarratives, consider any of the following as possibilities:

- *Discrepant claims against their narrative.* What aspects of their identity or image does your organization refute?
- *Repudiation of their existence.* What aspects of who they are (or are not) are bothersome to your organization, such that you reject them?
- *Discrepent claims by association.* What do they represent that is bothersome to your organization? Or, what do you hold against the audience by proxy? For example, the audience is part of a larger organization, industry, or society that is the real target of your counternarrative, but the audience provides opportunity to issue opposing messages?

For *their* defensive narratives against your counternarrative, consider any of the following:

- *Refutation.* Do they typically respond by direct negating or countering your messages?
- *Mitigation.* Do they typically respond by directing attention elsewhere, addressing your messages as irrelevant or off-base, or refusing to acknowledge your messages?
- *Accommodation.* Do they respond by acknowledging their errors or shortcomings and actively changing, but generally on their own terms?

★ 3.a. Audience 1: Name _____

For the short-form, choose the opponent from Step 1.

Your Counternarrative Against the Audience (include what part of their identity or image you oppose):

Their Defensive Narrative Against You (include whether it is a refutation, mitigation, or accommodation defense):

3.b. Audience 2: Name _____

Your Counternarrative Against the Audience (include what part of their identity or image you oppose):

Their Defensive Narrative Against You (include whether it is a refutation, mitigation, or accommodation defense):

3.c. Audience 3: Name _____

Your Counternarrative Against the Audience (include what part of their identity or image you oppose):

Their Defensive Narrative Against You (include whether it is a refutation, mitigation, or accommodation defense):

3.d. Audience 4: Name _____

Your Counternarrative Against the Audience (include what part of their identity or image you oppose):

Their Defensive Narrative Against You (include whether it is a refutation, mitigation, or accommodation defense):

3.e. Audience 5: Name _____

Your Counternarrative Against the Audience (include what part of their identity or image you oppose):

Their Defensive Narrative Against You (include whether it is a refutation, mitigation, or accommodation defense):

Activity Four: Describing how the Organization Communicates

Traditional strategic communication is oriented upward and outward from the position of the organization's leader. This is reinforced in military culture, where the commander is ultimately responsible for everything the organization does, but in practice is focused on setting conditions in the external environment to assure mission success. Stakeholders look to the commander as the figurehead or representative of the organization, and will naturally presume that the commander's vision is also the organization's vision, and that the organization's words and actions are in harmony with it.

Of course, we know that is not completely true. Organizations are composed of people, and not everything the organization says or does will align with the commander's vision. The obvious implication is that leaders are prone to take the organization for granted to some extent, and overlook the ways that the organization's behavior potentially undermines the leader's vision.

Opponents leverage this reality to the fullest. Each gap or inconsistency between the organization's narrative and its actual behavior is potential fodder for counternarratives. The traditional strategic communication perspective overlooks such gaps and instead promotes the personal capacity of the leader to overcome such idiosyncrasies by presence and powerful oration. This workbook takes a different view – that understanding the organization's behavior is essential and that the standing campaign may require internal cultural adjustments to address these gaps.

If the aim is to have the organization, including leaders and members, present a unified campaign, it is important to understand how the organization ordinarily communicates, internally and externally. Some campaigns will depend on the organization synchronizing all its communications, such as those related to human resources or other individual matters, whereas others will be more leadership-driven, such as those related to advanced capabilities development involving science and technology.

Organizational introspection is too often skipped or assumed away. Not all members may wish to discuss how information actually flows or does not flow within an organization. For example, military culture places great emphasis on the chain of command as a primary information source. However, the chain of command may not be best suited for promulgating the objectives of a particular campaign, as unit leaders have many responsibilities. Social media postings and mass e-mailings may serve as an alternative, but not all members will read and remember them. Choosing the best way means is made easier when leaders understand how information flows within the organization.

There are many models of organizational culture – this workbook will use that of institution theory. Communication is an *institutional practice* (or *institution*), defined by W. Richard Scott as "multifaceted, durable social structures, made up of symbolic elements, social activities, and material resources." Institutions represent ways of understanding activities and behaviors of collective bodies (including organizations), and thinking about how they do and should function. Although durable, institutions are dynamic and undergo a life cycle of being "created, maintained, changed, and [then they] decline," according to renowned institution scholars Mary Jo Hatch and Tammar Zilber.

The advantage of institution theory is its ability to model both the artifacts of culture and interactions among them. The theory separates artifacts into three general types – formal/regulated, informal/normative, and cognitive. Changing an artifact of one type can be accomplished through changes in the other types. The focus for this activity is to model the organization as it is. Activities under named campaigns will focus on changing the artifacts.

Three Pillars of Institution

Institutional practices are comprised of three "pillars"[1] – *regulative, normative,* and *cognitive*. For communication practices, these pillars represent different means of passing information and making decisions. *Regulative* channels are formal, codified, and require compliance. In communication, these represent channels that must be used when communicating for specific purposes. For example, if one wishes to speak with the media, one must employ public affairs because this is required per military regulations. Failure to comply results in sanction.[2]

The *normative* pillar guides organizations and its members toward acceptable behavior, such that they feel obligated to follow the norms, even when they circumvent or break the rules.[3]

The *cognitive* pillar regards how messages spread on their own from member to member. It reveals shared understandings, common beliefs, and values.[4] As shows, these pillars represent different means that can enable leader communication. However, the use of these means should align with members' expectations understanding of the situation. Misalignment can engender resistance to or rejection of the leader's message.

Highway Safety as an Example

I'll use highway safety as an example. In the 1960s and 1970s, as the U.S. Interstate System provided an important means for personal travel, institutional practices of regulating and managing traffic following. Laws established 60 mph (~100 kph) as the speed limit or maximum. Drivers were compelled formally to drive at that rate or slower. Due to the newness of mass auto travel, norms quickly formed that suggested the rules should be closely followed. So, the law was supported by driver obligations to obey it. Attitudes similarly favored the law, and not only did lawful motorists copy each other's behavior, they were irritated by drivers who choose not to follow the law and sped or drove dangerously. The law enabled police enforcement.

However, there were unsafe behaviors that fell outside the institutional practices at the time. These included a lack of safety restraints (e.g., seat belts) and consumption of alcohol while driving. Laws against drunk driving were on the books but not enforced, and families traveled with their kids unrestrained in the back of station wagons. Tragic accidents and aggressive driving would lead to calls for change.

How Institutions Form

Creating institutional practices is done through *institutionalization*, "processes by which social processes, obligations, or actualities come to take on a rule-like status in social thought and action."[5] Key is that all three pillars are enacted. The act of signing of a new regulation does not necessarily create matching norms nor change minds of members. Rather, what is institutionalized may be different from what the leader intended. Members may create norms (e.g., workarounds) that violate the intent of the new regulation. Members may also retain old habits as a way of addressing gaps and exceptions that the regulation does not handle adequately, or as direct contravention to the new regulation. Figure 5 shows different ways this can occur.[6]

Continuing the example of highway safety, one of the effects of increasingly aggressive driving was a push to lower the speed limits to 55 mph (~90 kph). So, the answer to emerging unwanted norms was changing the law – regulative action to correct normative behaviors.

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[1] Scott, *Institutions and Organizations*, 59.

[2] W. Richard Scott, "Approaching Adulthood: The Maturing of Institutional Theory," *Theory and Society*, Vol. 37, No. 5 (2008): 427-447, 428.

[3] Jennifer Palthe, "Regulative, Normative, and Cognitive Elements of Organizations: Implications for Managing Change," *Management and Organizational Studies,* Vol. 1, No. 2 (2014): 59-66, 61.

[4] Ibid., 61.

[5] John W. Meyer and Brian Rowan, "Institutionalized Organizations: Formal Structure as Myth and Ceremony," *American Journal of Sociology* 83, no. 2 (September 1977): 340-363. This was further elaborated in later works describing institutions as broader isomorphic templates. See Paul J. DiMaggio and Walter W. Powell, "The Iron Cage Revisited: Institutional Isomorphism and Collective Rationality in Organizational Fields," *American Sociological Review* 48, no. 2 (April 1983): 147-160 and Stephen R. Barley and Pamela S. Tolbert, "Institutionalization and Structuration: Studying the Links Between Action and Institution," *Organizational Studies* 18, no. 1 (1997): 93-117.

[6] Figure 5 is an original drawing by author based on Scott, Institutions and Organizations, 144-151, which includes an adapted figure cited from Pamela S. Tolbert and Lynne Zucker, "Component Processes of Institutionalization," in Handbook of Organizational Studies, eds. Stewart Clegg, Cynthia Hardy, and Walter R. Nord (Thousand Oaks, CA: Sage, 1996), 182.

But drivers did not necessarily slow down as cognitively, they did not see their own driving as the problem and therefore did not find the change of law salient. Limits on the ability to enforce the law consistently meant that police became selective. The posted limit was overcome

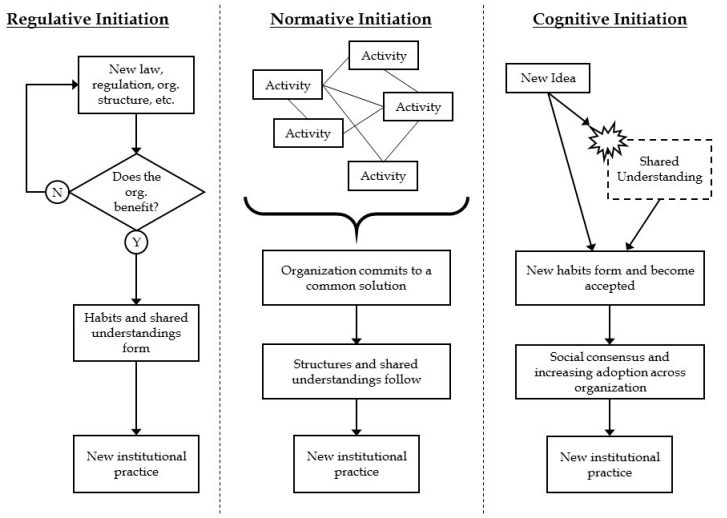

Figure 5. Multiple Ways Institutional Practices Form based on Scott (2014)

by normative pressures for drivers to operate at the same relative speed. 55 was the law but 65 (or 70) was okay so long as everyone drove the same speed. Mimicry overshadowed the law change.

It was a different story when it came to seat belts, because enforcement focused on the car manufacturers who were obligated to comply. Despite outcry from drivers who felt the restraints were dangerous (e.g., prevent people from leaving the car in a wreck), uncomfortable, or costly; seat belt installation became commonplace. Their presence, along with TV campaigns to promote their use, slowly introduced new norms of safety, and eventually attitudes changed in favor of their use to protect riders, especially children.

De-Institutionalization, or Breaking Habits

De-institutionalization "refers to the processes by which institutions weaken and disappear."[7] This can be either intentional or through social entropy, "the gradual erosion of [its] taken-for-granted character,"[8] such as practices that cease to have meaning and eventually stop occurring. Institutional scholar Christine Oliver identified several antecedent pressures such as poor organizational performance, conflicting internal interests, competition, social fragmentation, and decreasing historical continuity.[9] When these pressures exist, an institutional practice dissipates or becomes rejected by members, creating room for alternative practices to appear, which may replace the old practice.[10] Importantly, outlawing a practice alone does not cause it to go away completely; people's attitudes rejecting the practice are also needed.

Oliver's antecedents include the following (see Figure 6[11]): *Competitive pressures* cause the utility or legitimacy of an institution to be called into question."[12] Such pressures arise because the practice is having a detrimental effect on organizational performance or its member commitment and is therefore simply being abandoned despite still being codified.[13] *Functional pressures* arise when the increase in technical or administrative requirements exceeds the value of the institutional practice. As the practice becomes too complex or cumbersome, members may abandon it. Finally, *social pressures* can cause members to become fragmented over the value or utility of a practice, "causing divergent or discordant" beliefs.[14] These pressures can be further enabled by what Oliver called *entropic pressures* that members use to push change along. Meanwhile, *inertial pressures* that members use to restrain change or resist it, even when they may agree that

[7] Scott, *Institutions and Organizations*, 166.

[8] Lynne G. Zucker, "Where do Institutional Patterns Come From? Organizations as Actors in Social Systems" in *Institutional Patterns and Organizations: Culture and Environment*(Cambridge, MA: Ballenger, 1988), 26.

[9] Christine Oliver, "The Antecedents of Deinstitutionalization," *Organization Studies* 13, no. 4 (1992): 563-588, 567.

[10] Scott, *Institutions and Organizations,* 171.

[11] Figure 6 is adapted from Oliver, "Antecedents," 567.

[12] Ibid., 568.

[13] Ibid., 567. Oliver's original term was "Political Pressure," however in practice all three categories of pressure achieve political effects on an organization or society. This was certainly true regarding social pressures leading to DADT's repeal. Oliver herself used "competitive pressure" synonymously.

[14] Scott, *Institutions and Organizations*, 169.

a particular habit has to break. Inertial pressures can include desires to delay change or redirect the effort elsewhere so they don't have to deal with the turmoil.

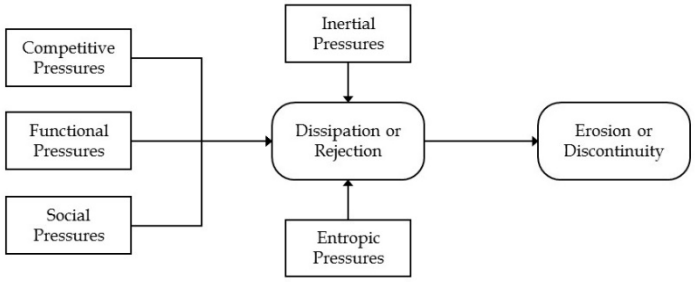

Figure 6. Forces Weakening an Institutional Practice based on Oliver (1992)

Which brings us to the erosion of drunk driving. Drunk driving laws were introduced in the early 20th century. Tests for impairment evolved until the first breathalyzers were developed in the 1950s. However, enforcement was reactive, after the drunk driver had an accident, and not so preventative. This changed as anti-drunk driving groups formed.[15] They exerted functional pressures to show the dangers of drinking while driving and social pressures to encourage designated drivers. Inertial pressures came in the form of ambivalence – some drivers feared being singled out, not seeing themselves as the problem. Entropic pressures came as streams of tragic accidents, some involving youths, fueling calls for change.

Roles of Paradox

It is possible for an organization to speak and act at one? Institution theory suggests maybe, if indeed there was full alignment among rules, norms, and member attitudes. In order words, the organization would not only have to be homogeneous, it would have to vigilantly so.

In reality, organizations typically face paradoxical pressures that create natural tensions. Scholar Marianne Lewis identified them as: (1) *paradoxes of learning* that captures natural tensions between continuity and change, (2) *paradoxes of organizing* between control and flexibility, and (3) *paradoxes of belonging* that pits matters of individual perspective against those of the collective. When we think about the organization's narrative, particularly the image it projects, the organization is going to side on way or another on each of these paradoxes, but the paradoxes suggest places to find possible gaps. For example, a military organization may resolve a paradox of belonging by espousing collective values at the expense of the individual. Yet, if individual needs conflict (now or in future), this can lead to gaps and inconsistencies in the organization's overall communication.

Military organizations have an additional paradox that emerges from being both a profession and a public sector bureaucracy.[16] Among such tensions are the need for effectiveness versus efficiency.

Structure of the Activity

So how does the organization actually communicate? What are the gaps and inconsistencies in its own narrative and behavior? How can the organization speak and act in concert with the leader's vision and the organization's own narrative? For large organizations, it is likely infeasible to develop a detailed recounting of all internal actions, norms, and attitudes that drive the organization's behavior, but a broad look is certainly possible.

This activity focuses on recurring patterns of words and actions related to the standing campaign, rather than the issue-specific. You will identify critical gaps and inconsistencies that routinely arise between the organization's narrative and its own behavior. First, you will model institutional practices of communication, and then use paradox to find potential gaps and inconsistencies with the organization's narrative, along with coping mechanisms that the organization uses to address these natural tensions.

[15] Many of these groups, especially Mothers Against Drunk Driving, were formed from family members of drunk driving victims.

[16] Don M. Snider, "The U.S. Army as a Profession," in *The Future of the Army Profession*, 2nd ed., Don M. Snider and ed. Lloyd Matthews (New York: McGraw-Hill, 2005), 1-17.

Conduct of Activity Four: Describing How the Organization Communicates

For the short form of this activity, complete items marked with a star (★) – steps 1e, and 2-4 (reduced)

★ 1. Determine the Organization's Overall Purpose for Communicating:

The organization's purpose for communicating is *why* the organization promotes and defends its narrative while attacking the narratives of others. Later steps will examine the *how* – formal, informal, and shared understandings – that the organization exercises communication to serve this purpose.

1.a. For what purpose does the organization *promote its narrative*? What aspects of the narrative is most often openly promoted and why? What aspects of the narrative are hidden or understated and why?

1.b. For what purpose does the organization *protect or defend the narrative*? What is the ordinary response when the organization is targetted with opposing messages?

1.c. For what purpose does the organization *target opponents*? What is its ordinary approach when the organization attacks or confronts the narratives of opponents using counternarratives?

1.d. For what purpose does the organization *adapt its narrative*? How fluid or flexible is the organization's identity? How willing is it to evolve with changes in the environment?

★ 1.e. Develop a short paragraph or set of bullet points that describe the organization's overall purpose and practices of communication – encapsulating why it promotes, defends, and adapts its own narrative while confronting the narratives of others. Later steps will subdivide this into formal rules and procedures, informal norms, and shared understandings.

2. Determine Formal Communication Mechanisms and Roles

Focusing solely on the purposes for promoting, defending, and adapting the narrative and targeting opponents, what are the key formal mechanisms that support the organization's standing campaign? These formal mechanisms should be found in laws, regulations, policies, or other means in which members are compelled to communicate certain messages to certain audiences in certain ways. The following list is a sample of formal mechanisms that drive the manner by which military organizations communicate, but this list is hardly exhaustive. Each of these are governed by regulation or law:

> *Media relations (public affairs), information operations, defense support to public diplomacy, legislative affairs, security assistance and security cooperation, operations, mobilization, public administration, military historians, intelligence, operations security, and others, administrative taskings, published orders and directives, contracting and acquisition, inspectors general, etc..*

★ 2.a. List those with the greatest impact on the standing campaign—formal mechanisms that drive the way that the organization communicates. Important: Include those that are problematic –e.g., laws, policies, or rules inhibiting communication important to the standing campaign. Use continuation sheets if needed.

For the short form of this step, provide two such mechanisms and include one that is problematic in some way

★ (1) Role/mission/purpose: _____

Governed under policy/regulation: _____

Whose primary responsibility: _____

Comment on the effectiveness or efficiency:

★ (2) Role/mission/purpose: _____

Governed under policy/regulation: _____

Whose primary responsibility: _____

Comment on the effectiveness or efficiency:

(3) Role/mission/purpose: _____

Governed under policy/regulation: _____

Whose primary responsibility: _____

Comment on the effectiveness or efficiency:

(4) Role/mission/purpose: _____

Governed under policy/regulation: _____

Whose primary responsibility: _____

Comment on the effectiveness or efficiency:

(5) Role/mission/purpose: _____

Governed under policy/regulation: _____

Whose primary responsibility: _____

Comment on the effectiveness or efficiency:

(6) Role/mission/purpose: _____

Governed under policy/regulation: _____

Whose primary responsibility: _____

Comment on the effectiveness or efficiency:

★ 2.b. Consider the most recent instances when any of these formal mechanisms underwent substantive change. What drove it? In what ways were the narrative under threat that required the institution or modification of formal mechanisms? Or, was it a significant opportunity? How does this suggest leaders may alter such formal mechanisms in future?

For the short form, explain one such instance that impacts communication the greatest.

★ 3. Determine Normative Mechanisms Used by the Organization

Focusing solely on the purposes for promoting, defending, and adapting the narrative and targeting opponents, what are the key normative mechanisms that enhance, work around, or replace formal mechanisms? These are habits, norms, protocols, and obligations that the organization relies on to communicate above and beyond (or despite) formal ways? The following questions will help identify some of these mechanisms.

★ 3.a. Identify as many norms as possible using the below list as a guide. Recommend identifying the categories (1 through 7) that best describes the norm. Continues on next two pages.

For the short-form of this step, identity 3 norms total from among the categories. It is not necessarily to identify one for each (but you are encouraged to do so)

(1) That the organization has developed to disseminate routine information or solicit feedback from others
   - *Handling of staff actions, monthly/weekly/daily updates or meetings, significant activities reports, intranets, and other leader-driven activities?*

(2) Senior leader dissemination of personal communications to the members and how members respond to them
   - *e.g., mass communications such 'commander sends' e-mails, public affairs releases, town hall meetings; or routine communications such as guidance given during staff meetings, prioritizing organizational efforts, resourcing decisions, etc.*

(3) How leaders communicate change and transitions
   - *Develop and deliver messages about what an organization must give up? What an organization must incorporate or gain? Dealing with uncertainty in between?*

(4) How leaders exercise control over the message
   - *Levels of autonomy given to members to tailor messages according to the situation? Rewards and sanctions imposed (or implied) for deviating from norms?*

(5) The extent to which leaders/members convey emotions
   - *Are there expectations/rewards/sanctions associated with rationality and objectivity, vice subjectivity and emotional displays? Are these context dependent?*

(6) Leadership involvement in internal matters
   - *Especially if extreme, which can range from micromanagement to complete hands-off leadership*

(7) Preferences for communication channels
   - *Vertical (follows the chain of command), functional (leaders tap the experts directly), etc. Do these change according to the situation?*

★ 3.a. Identify as many of the specified norms as possible (*continued*)

★ 3.a. Identify as many of the specified norms as possible (*continued*)

★ 3.b. Consider the most recent instances when any of these normative mechanisms underwent substantive change. What drove it? In what ways were the narrative under threat that required the institution or modification of normative mechanisms? Or, was it a significant opportunity? How does this suggest leaders may alter such normatice mechanisms in future?

For the short form, explain one such instance that impacts communication the greatest.

★ 4. Determine the Shared Understandings of the Narrative Among Members:

Focusing solely on the purposes for promoting, defending, and adapting the narrative and targeting opponents, consider the culture and climate of the organization. In what ways are members committed to the organization's standing narrative – because if they aren't, there may be gaps between the organization's words and actions? What stories get passed around from member to member that influence such commitment to the standing narrative?

IMPORTANT: Avoid shared understandings related to specific leaders and focus on persistent or recurring views of the organization over long-term. Activity Five will cover shorter-term leader-specific matters.

★ 4.a. *Member commitment* to the organization can be described as the combination of three factors – the extent to which members like being in the organization (affective attachment), feel a sense of obligation to the organization, or remain via some sort of cost-benefit analyses. In a few bullets, describe how true or untrue the below statements are for the membership in general or particular subgroups.

- Members like being part of the organization (e.g., camaraderie, feeling that the work is rewarding or valued, having a voice)
- Members feel obligated to be part of the organization (e.g., duty, loyalty, debt to the organization/society/nation)
- Members have analyzed the costs and benefits of membership in the organization and believe that staying is preferred over leaving

★ 4.b. Consider the following common tensions in organizations, based on Lewis' (2000) paradoxes. To what extent do they present sources of conflict or tension (e.g., internal counternarratives) against the standing campaign?

For the short form of this step, give one example aligned with one of the below

(1) Between the needs of individual members and the needs of the organization; can also be needs of any subgroup against any other subgroup or the whole organization (subgroups may be separate divisions/subunits or functional areas/communities of practice)
(2) Between continuity (need for reliability, predictability, or stability) and change (need for disruption, innovation, breaking perceptions of complacency)
(3) Between centralizing for efficiency and decentralizing for effectiveness or autonomy

★ 4.c. Consider the following common tensions in military organizations. To what extent do they present sources of conflict or tension (e.g., internal counternarratives) against the standing campaign?

For the short form of this step, give one example aligned with one of the below

(1) Between the professional character of the military and its roles as a public-sector bureaucracy
(2) Between the core mission set of conventional military operations versus the more emergent mission set of counterinsurgency, unconventional operations, or other types of operations
(3) Among resourcing requirements: (a) force structure, (b) current readiness of the force, and (c) future modernization

★ 4.d. List other myths and stories related to the standing campaign, using the below templates from Martin et al. (1983). These can be positive (reinforcing the standing campaign) or negative (internal counternarrative against it), but the stories should be of a persistent or enduring nature and not tied to specific (especially current) leaders.

For the short form of this step, give one example aligned with one of the below

(1) Based on how well or poorly the organization has dealt with obstacles in the past

(2) Based on how well or poorly leaders respond to member mistakes

(3) Based on how well or poorly leaders making mistakes respond when called out by members

(4) Based on how well or poorly leaders show empathy toward problems faced by members

(5) Based on how the organization develops its members or inhibits/blocks their development

(6) Based on how the organization handles or mishandles misconduct and other disciplinary matters

(7) Based on how well or poorly leaders make or explain complex or controversial decisions

4.e. Name examples of important stories, myths, or other messages entering the organization from the external environment that are influencing member commitement to the standing campaign. For example, changes in societal attitudes toward X are causing members to be more accepting of X despite its incompatability with the standing campaign (e.g., homosexuality and its compatability with military service prior to the repeal of the Don't Ask Don't Tell law in the U.S.).

★ 4.f. Consider the most recent instances when any of these shared understandings underwent substantive change. What drove it? In what ways did these shared understandings conflict with the formal and informal mechanisms from steps 2 and 3?

For the short form of this step, answer in one or two bullets

5. List Considerations for Named Campaigns:

In the below space, consider all the factors above that contribute to shared understandings among members of the organization and the ability of their messages to spread. Which are of paramount concern with respect to any named campaigns – deliberate actions to change the organization's narrative?

Activity Five: The Leader's Professional Campaign

Senior leaders are vital to their success of communication campaigns, regardless of whether they play active figurehead roles or operate in the background, generally hidden from public view. Senior leaders are the ultimate arbiters, developers, and communicators of the organizational narrative. Their abilities to convey narratives through personal words and deeds impact internal and external commitment to those narratives. Leaders failing to externalize narratives or creating say-do gaps in their personal examples will not see their campaigns succeed.

Many books and resources address the communication skills of leaders, such as how senior leaders prepare and execute individual communication activities. But those are tactical measures. What about the senior leader's effectiveness as a campaigner? The capability to develop and promulgate a successful narrative, or fending off the counternarratives of others, and rallying the organization in support of the cause?

The senior leader ultimately drives the named campaign. That approval may not be explicit, but it must occur for there to be a campaign, otherwise it is not legitimate. But the leader is also an explicit target of others in the standing campaign, and how leaders communicate in that campaign will speak volumes of how leaders will pursue deliberate change in the organization.

Beginning with this activity, we shift to named campaigns – where the leader deliberately intervenes in the standing campaign. However, before such intervention occurs, one has to consider the impact that the leader—by virtue of being the leader—is already having on the standing campaign. This is because the leader has a personal standing campaign that they import into the organization once they assume leadership responsibilities. The components of the campaign of interest include the professional agenda of the leader, mandates delivered by stakeholders, and the preferred ways of making decisions.

You probably want to avoid looking at "personality," which cloud all sorts of individual factors that drive leader decision making. Personality factors between a leader and the members or between predecessors and the incumbent certain matter in interpersonal relationships, but they are subjective and will be difficult to use as a construct to understand where the leader is trying to take the organization. Objective data such as stated vision, intent, and strategic direction *and their on-going formulation or re-formulation* is more important. So too are internal and external barriers—counternarratives—arrayed against the leader and/or the organization.

In effect, this activity seeks to separate as much as possible the personal narrative of the individual from the professional narrative of the leader, that portion of the leader's identity associated specifically when the leader makes salient the statement, "*I am the leader*."

The Leader's Professional Narrative

Much like organizations, the identity and projected image of the leader constitute the basis of a personal standing campaign that addresses who the leader is, what is important to them, and how they see their roles in the organization. What is important for developing named campaigns are finding key similarities and differences between the organization's narrative and leader's narrative. The differences will be especially important as they are likely to produce fodder for resistance against the campaign, as opponents inside and outside the organization may use them to fuel anti-leader counternarratives. Important similarities include the extent that leader shares and projects the same central character or identity of the organization. In effect, how much the leader assumes the identity of the organization vice retaining some degree of individuality.

Some areas where this identity will be manifest are differences in leader behavior vice the organization's expectations regarding the leader's roles as a communication. Leaders play prominent roles in the development and sustainment of all the organization's

communication, but how leaders enact those roles depends greatly on the leaders. Some leaders prefer to be more public while others prefer to remain in the background and allow members to speak and act more on the organization's behalf. Still others are flexible, and change their communication profile based on the circumstances.

The first role is *embodiment of the organization.*[1] Senior leaders adopt a working identity that is congruent with the organization's identity. In essence, whatever the organization sees as salient, the leader personally adopts. Leaders of professional organizations, for example, must be consummate professionals and conduct themselves accordingly. Similarly, one expects leaders of service organizations to embody the organization's service mission and avoid appearing to act in self-serving ways. There is also the matter of presence and how the leader personally projects to the environment is important.

Second is that the leader is *steward of the organization's narrative.*[2] While leaders may not be able to control or manage all the organization's communication, they are its caretakers by virtue of the legitimacy they confer upon members. Therefore, they have the personal responsibilities to assess the quality of the standing campaign and determine the need for named campaigns. Key is to understand where the leader perceives the need to change or bolster the organization's narrative. Is the leader importing new perspectives into the organization? Does the leader perceive differences between what organization espouses versus what members enact or actually believe? What does the leader want to change or transform in the organization?

Third, leaders serve as *governors of the organization's communication process.* Leaders own the internal processes of communication, regardless of how much they exercise personal control over it. They must account for how organizations ordinarily engage with their environments – formally and informally. If the communication process is not working, the leader must fix it or assume the risks of communication failure.[3] It is important to capture differences between leader preferences and the organizations' norms and habits as captured in Activity Four. Such differences alone can create considerable conflict in the organization.

Once a leader decides upon a named campaign, the leader must own it. Leaders are the *champions of the organization's campaigns.* Even when the need for a named campaign is initiated and exercised by members, it is the leader who champions it through an organizational climate that permits the campaign's implementation and prevents the erection of barriers against it. Or, the leader may elect to assert ownership of the campaign and in turn confer direct legitimacy to the members conducting it.[4] If the leader is new, it is possible that the first named campaign will determine the degree and manner that the leader champions it. More likely, however, the leaders' reputations precede them, particularly at the senior levels of the military since they are promoted from within the enterprise. How and when they confer legitimacy on campaigns, especially those they do not personally initiate, are likely to be known or perceived to be known through rumors/shared understandings related to past experiences.

Vision, Intent, Strategic Direction

In addition to how the leader assumes roles are the statements associated the strategic direction that the leader wishes to take the organization. These statements come in many forms and are named differently, but they serve the same purpose – to describe the desired future state of the organization and the nature and character of activities that are deemed suitable, feasible, and acceptable for pursuing it. In essence, these explain both what would be considered the bounds of acceptable ends and ways for any organizational strategy, plan, program, or activity. Typically, many of these

[1] This duty is a combination of the *figurehead* and *spokesperson* roles described in Henry Mintzberg, *The Nature of Managerial Work* (Englewood Cliffs, NJ: Prentice-Hall, 1973).

[2] This duty is derived from the work of Don M. Snider in relation to stewardship of the profession. See Snider, "The U.S. Army as a Profession."

[3] This combines Mintzberg's decisional and interpersonal roles in driving the organization's culture and internal processes. However, in military organizations this duty is often delegated to a deputy or chief of staff.

[4] John Kotter, *Leading Change* (Boston, MA: Harvard University Press, 1996).

statements have confirmatory elements, in essence re-stating what is already considered the norm. Leaders may do this to assure the organization and reinforce the narrative. However, if the leader is intent on transforming the organization in some way through a named campaign, statements of vision or strategic direction may contain disruptive elements.

The following definitions will be used in this activity book. They may differ from those used by any particular leader.

Vision

The *vision* is a mental image of the desired end state at some point in time. Ordinarily visions are expressed as long-term goals, however they may be sometimes be confirmatory and express attributes already existing in the organization that the leader wishes to keep for continuity.

This activity book differentiates vision from a *vision statement*. The vision statement is a symbol representing the vision, not the vision in its entirety. The purpose of the vision statement is to aid in the sharing of the mental image among members, stakeholders, and others (e.g., clients, peer organizations). This activity book will not equate vision statement with vision.

Intent

The intent is a declaration of how the leader wishes the vision to be achieved or the organization to behave. Components of an intent include what is known in military organizations as a *concept of the operation* that describes how organization will the vision or specified shorter-term outcomes, *key tasks* that the leader wants the organization to accomplish, *coordinating mechanisms* that encourage disparate parts of the organization to work together toward the vision, and *end state* which expresses how the organization knows it achieved the vision. The end state may include qualitative or quantitative measures that the leader expects the organization to monitor or collect data on.

Strategic Direction

Strategic direction overlays the parameters of decision making on the vision and intent to help the organization understanding what matters require leader involvement and what do not.

Prioritization is one example, as leaders may decide that some factors are more important than others or leaders will pay attention to certain things more than others. At the strategic level, lacking prioritization is not uncommon as it allows some flexibility. It also avoids having the organization channel all energies toward a single number-one priority at the expense of other things. Other parameters include means (e.g., manpower, resources, facilities), external requirements, and the need to be prepared for contingencies (e.g., crises, opportunities).

Counternarratives Against the Leader

By virtue of being the organization's leader, the leader will likely be a target for criticism. It is important to separate, at least conceptually, the counternarratives that are directed at the leader personally versus those directed at the organization. Opposing messages, particularly from outside, will not distinguish the target necessarily and opponents are likely to shift targets based on opportunity. For example, opponents of the organization will criticize a leader's message and delivery of it if the criticism serves the counternarrative against the organization as a whole. Alternatively, some counternarratives are very personal and argue against the leader, with opponents also delivering messages against the organization as a way of attacking its leader.

A key consideration for differentiating the true target is to determine the extent that the opposing message is singularly against the leader and would follow the leader upon departure. That is, once the leader has transitioned, will the successor remain subject to the same messages or like the organization? Or, will the messages against the successor and organization cease or change significantly? For present purposes, if the counternarrative is against the position of leadership, where messages remain consistently opposed to the leader no matter who is serving as leader, that is viewed as a message against the organization and not the leader personally. The intensity of counternarratives against the leader follow a similar spectrum as those against the

organization – from rational to emotional – as shown in Figure 7[5]:

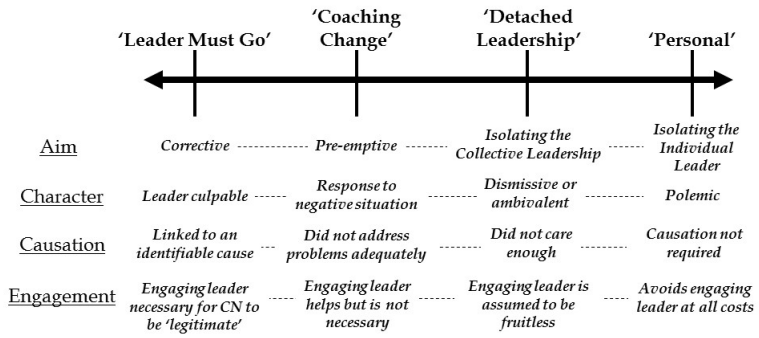

Figure 7. Intensity of Counternarratives Against Leaders

- *Leader deserves to 'go'*. This is the most rational type. These take a specific action of the leader, usually a mistake of some kind, and question the leader's ability to avoid repeating the mistake.
- *A 'coaching change' is required.* These are also rational, but less likely to pin specific errors on the leader rather than suggest indirect culpability for an organization's failure. This is akin to the idea that a sports team's performance is below expectations, and it is the coach's responsibility to prepare the team, therefore it is the coach that is first scrutinized.
- *The leader is detached from reality.* Trust and confidence in the leader is in question. The leader is seen as detached from the organization or derelict in responsibility. Personality differences, contribute to such counternarratives, as do differences between the organization's identity and the leader's vision and strategic direction.
- *The leader is (alleged to be) evil.* This the where the counternarrative gets extremely personal (which is ironic since it dehumanizes the leader utterly). Anything the leader says or does, no matter how beneficial or good, is criticized without consideration of the leaders' motives or actions. Such counternarratives remove context and insert an alternative context in which the leader is painted in as bad a light as possible without hope of changing the opponent's minds.

With the counternarratives identified, one can identify the leader's defensive strategies. These follow analogously from the defensive narratives in Activity Two. Does the leader prefer to confront opposing messages directly and in turn issue counternarratives against opponents? Does the leader prefer to accommodate opposing views and feels comfortable changing orientation in ways visible to others? Or, does the leader prefer to ignore or treat opposing messages as irrelevant – talk to the hand? In the latter case, the leader may either utterly ignore or refuse to acknowledge the message, or may deflect the message (and associated blame) to others.

Structure of the Activity

This activity compiles data on these three areas to develop an image of the leader's intentions for the organization and establish the context under which the leader will pursue and champion named campaigns. The result will be a leader's professional narrative. First, the leader's preferences in the execution of their roles will be identified. Second, the leader's official, public statements of vision, intent, and strategic direction will be listed along with other communications that refine, amplify, or negate them. This might include guidance given in meetings, decisions, and informal discussions with members or stakeholders. Then, the counternarratives and defensive narratives of the leader will be laid out to determine how the leader will respond to criticism as the named campaign takes shape. The activity concludes with the collection of insights that combine these elements together to paint a mental image of the leader's wants and desires for the organization.

[5] Figure 7 is an original graphic by the author.

Conduct of Activity Five: Constructing the Leader's Professional Narrative

For the short form of this activity, complete items marked with a star (★) – steps 2b-c, 3b-c, and 4 (reduced).

1. Identify the Leader's Perspective on Communication Roles:

In this first step, you will identify the leaders' perspectives on the roles of embodying the organization, stewarding the organization's narrative, governing the organization's communications process, and championing named campaigns. The purposes are to draw similarities and contrasts with the organization's standing campaign that could inform the creation of a named campaign.

The below table shows a map of these four roles to the previous activities.

Embodying the Organization	Stewarding the Narrative

• How the leader views the communication environment surrounding the organization
  o See Activity Three: Steps 1 – 4 for external audiences
• How the leader exercises presence in the organization to members
  o See Activity Three: Steps 1 – 2 for internal audiences
	• How the leader's identity and projected image align with the organization's narrative
	  o See Activity One: Steps 2 & 3
	• How the leader's response to counternarratives against the organization align with the norms, habits, or preferences of the organization
	  o See Activity Two: Steps 4 & 5
	• How the leader implements counternarratives against others, different from the norms, habits, or preferences of the organization
	  o See Activity Three: Step 4

Governing Communication Processes	**Championing Named Campaigns**

• How the leader chooses to communicate about the narrative – through formal regulated means, normative actions, or developing shared understandings among members?
  o See Activity Four: Steps 1 - 4
	• How the leader has leveraged or bypassed challenges and opportunities related to previous attempts at named campaigns
	  o See Activity Four: Step 5

1.a. For *embodying the organization*, list down factors to consider related to the manners in which the leader uses presence to represent the organization, internally or externally. *Hint: Avoid using judgment terms such as 'good' or 'bad,' 'successful' or 'unsuccessful.' Focus on what is objective and evidence-based.*

- Select audiences from Activity Three who garner particular interest of the leader, especially as they reflect strong alignment with or change from previous relationships. For example, if an opponent is being treated by the leader as a friend or ally, or if a relationship with a stakeholder is becoming more intense than in the past (e.g., due to important resource decisions pending). Explain the impact the leader is having or seeks to have on the relationship with that audience.

- List any other factors concerning the leader's traits or competencies that strongly align with or deviate from the organization's interrelationships with external audiences. For example, if previous leaders have been introverted while the present leader has been extraverted, how has the leader's behaviors changed the way the organization is perceived by others?

- List any other factors concerning the leader's traits or competencies that strongly align with or deviate from the organization's interrelationships with external audiences. For example, if previous leaders have been introverted while the present leader has been extraverted, how has the leader's behaviors changed the way the organization is perceived by others?

1.b. For *stewarding the narrative*, list down factors to consider related to the manners in which the leader uses words and actions to promote, adapt, and defend the organization's narrative or attack the narratives of other actors in the environment. *Hint: Avoid using judgment terms such as 'good' or 'bad,' 'successful' or 'unsuccessful.' Focus on what is objective and evidence-based.*

- To what extent do the leaders' words, actions, and beliefs reflect acceptance or alignment with the organization's standing narrative? List examples of components of the narrative (identity or image) that the leader supports strongly, and evidence (specific actions or words) reflecting that support.

- To what extent do the leaders' words, actions, and beliefs reflect disagreement with the organization's standing narrative and/or a desire to change it? List examples of components of the narrative (identity or image) that the leader does not support, along with evidence (specific actions or words) reflecting that lack of support. *Also, note the intensity – does the leader strongly intend to change this aspect of the narrative? Or is the leader willing to wait for opportunities? Or is this something the leader considers low priority for action but is willing to voice disagreement anyway?*

- Select as apporpriate counternarratives identified against the organization from Activity Two that draws greater attention from the leader. To what extent does the leader align with or deviate from previous organizational responses to that counternarrative? More aggressive or less aggressive? Changing from one type of defensive narrative to another? How effective has the leader been in representing the organization against counternarratives?

- Select as apporpriate counternarratives issued by the organization to others from Activity Three that either draws greater attention from the leader or were initiated by the leader. To what extent does the leader align with or deviate from previous organizational messages against opponents? More aggressive or less aggressive? Changing from one type of counternarrative to another? How effective has the leader been in representing the organization when on the offense?

1.c. For *governing the process*, list down factors to consider related to the manners in which the leader uses words and actions to sustain or alter the way the organization communicates, as captured in Activity Four. *Hint: Avoid using judgment terms such as 'good' or 'bad,' 'successful' or 'unsuccessful.' Focus on what is objective and evidence-based.*

- Describe the leader's approach or preferences regarding formal regulative means of communication (e.g., policies, regulations, etc.) that establish requirements for members? How does this align with or differ with current organizational practices?

- Describe the leader's approach or preferences regarding informal normative means of communication (e.g., obligations, guidance, exercising of mission command or other delegations) that establish norms and values for members? How does this align with or differ with current organizational practices?

- Describe the leader's approach or preferences regarding cultural means of communication (e.g., words or actions designed to cause members to spread information about the leader and leader perspectives) that contribute to desired shared understandings among members? How does this align with or differ with current organizational practices?

- Summarize the above and list out ways in which the leader clearly desires to sustain or change the way the organization communicates with itself. What does the leader wish to accomplish internally with the organization through the leader's own words and actions?

1.d. For *championing named campaigns*, list down examples of past named campaigns under this leader that sought to reinforce or transform the organization's narrative. Which of the factors listed in a-c above were exercised in the named campaign by the leader? What were points of agreement or resistance from members, stakeholders, or others? How did the campaign turn out (or is it still on-going)? *Hint: Avoid using judgment terms such as 'good' or 'bad,' 'successful' or 'unsuccessful.' Focus on what is objective and evidence-based.*

2. Identify the Leader's Vision, Intent, and Strategic Direction for the Organization:

For these questions, include formally established or published versions along with other leader words or actions that enhance, clarify, or amplify. Items reflecting on-going debate, discussion, or deliberation should also be identified (see item d. below).

2.a. List the organization's formal vision statement and other communications related to the leader's expressed desired future state. Include the anticipated time frames, particularly for goals or objectives that differ from the short-term to the long-term

★ 2.b. List the leader's preferred path to the end state – the *intent*. These may be formally published or releases incrementally through leader personal communications.

For the short form of this step, summarize each of the below in 1-2 bullets.

- Identify the leader's concept for achieving the end state. What is the leader's preferred strategy for taking the ways and means available (or needed) to achieve the end state and any intermediate objective?

- Identify the key tasks or major events that must take place to accomplish the end state. Who has responsibility? (This should not exceed 10 – too many and they risk getting into unneeded detail)

- Identify the measures of merit (qualitative or quantitative) that would help the leader determine if or when the desired future state would be achieved. How are those measures communicated? Who is monitoring the data?

★ 2.c. Describe the leader's *strategic direction* for the organization. What determines the activities or objectives receiving the most priority? If priorities are not established, how is organizational energy distributed and managed?

3. Identify Counternarratives Against Leader and Leader Defensive Narratives:

In this step, you will develop lists of counternarratives and defensive narratives oriented on the leader – (a) those that view the leader personally as a target, (b) the defensive narratives the leader uses in response, and (c) the counternarratives the leader uses against others. The below steps are condensed forms of Activity Two and Activity Three, Step 4.

3.a. Messages Against the Leader. Consider the following broad categories of opposing messages that target the leader personally, or target the organziation solely on the basis of the leader's personal presence as the leader (counternarratives against the organization should be part of Activity Two). *Limit the responses to those that are broadly shared, not merely a personality conflict with one or a few – the purpose is to capture key sources of resistance for potential named campaigns.*

- *Discrepant Claims Against the Leader's Identity*. These counternarratives argue the leader's own self-concept is not shared by others. For example, the leader sees him/herself as a caring leader who is concerned about members, but messages from members suggest that the leader is detached and uncaring (whether because of leader's reputation from previous responsibilites or because of incidents occurring in the present position).

- *Repudiation of the Leader.* These counternarratives are personal! They can represent personality clashes, where the leader is portrayed negatively without regard for context. Messages of dislike, distrust, or otherwise dehumanizing the leader (e.g., avoiding using the leader's name or substituting it with disrespectful terms) should be coalesced into general narratives targeting who the leader is personally. Careful not to restrict yourself to such counternarratives coming from only within the organization. *Hint: Consider comparisons with other, seemingly preferred, predecessors or alternative choices for the leader.*

- *Discrepant Claims by Association*. These counternarratives draw from other aspects of the leader's identity not associated with the position of leadership but through actual or perceived associations with others. Consider the leader's class or social status (including personal property or wealth), memberships in outside groups, personal ventures such as other businesses the leader has a stake in, family or other social associations as sources for opposing messages.

★ 3.b. Assemble the above messages into counternarratives against the leader. Then identify the corresponding defensive narratives used by the leader (based on leader's words and actions) to defend against those counternarrartives. Characterize the defensive narrative as follows (recall from Activity Two – *refutation* reflects an orientation toward confronting opposing messages and demonstrating their inaccuracy, *mitigation* reflect ignoring or deflecting opposing messages, *accommodation* reflects acknowledgment of the leader's own shortcomings and desires to change self). Space is given for two counternarratives – use continuation sheets if needed.

For the short form, summarize the respective stories as a single sentence.

- ★Counternarrative 1 Against Leader: _____
- Story:

- ★Defensive Narrative 1: By Leader: _____
- Which type? *Refutation* *Mitigation* *Accommodation*
- Story:

- ★Counternarrative 2 Against Leader: _____
- Story:

- ★Defensive Narrative 2: By Leader: _____
- Which type? *Refutation* *Mitigation* *Accommodation*
- Story:

★ 3.c. Consider counternarratives the leader personally uses against opponents, and how the opponents defend themselves. It is important to differentiate the counternarratives that are part of the organization's standing campaign that the leader is exercising by virtue of being the leader, and instead focus on those that leader personally initiates and sustains, perhaps in response to the counternarratives identified in b. above. These may not mirror the counternarratives launched against the leader, that is the leader may have more salient targets to attack than the ones attacking him/her. The below is a condensed version of Activity Three, Step 4.

For the short form of this step, complete for only one audience.

For counternarratives by the leader against others, consider who the target audience is and:

- *Discrepant claims against their narrative.* What aspects of their identity or image is the leader disputing?
- *Repudiation of their existence.* What aspects of who they are (or are not) are bothersome to the leader, such that the leader rejects them?

For *their* defensive narratives against the leader's counternarrative, consider any of the following:

- *Refutation.* Do they typically respond by direct negating or countering the leader's attack?
- *Mitigation.* Do they typically respond by directing attention elsewhere, addressing leader messages as irrelevant or off-base, or refusing to acknowledge the messages?
- *Accommodation.* Do they respond by acknowledging their errors or shortcomings and actively changing, but generally on their own terms?

★Audience 1: Name _____

Leader Counternarrative Against that Audience (include what part of their identity or image opposed):

★ Their Defensive Narrative Against the Leader:

Audience 2: Name _____

Leader Counternarrative Against that Audience (include what part of their identity or image opposed):

Their Defensive Narrative Against the Leader:

Audience 3: Name _____

Leader Counternarrative Against that Audience (include what part of their identity or image opposed):

Their Defensive Narrative Against the Leader:

★4. Write the Leader's Professional Narrative:

Consolidate all the above into a simple narrative describing what the leader wants for the organization and the commitment to achieve it. Include in the narrative aspects of the communication environment – internal and external – that enhance or detract from the leader's desires and how the leader copes with them. Also, forecast what the leader is likely to consider as priorities for named campaigns and how the leader prepares the organization to undergo it.

For the short form of this step, summarize the leader's professional narrative in a few bullets.

Activity Six: Develop the Named Campaign

To this point, all the activities have focused on analysis – what is the organization all about and the leader's roles and intentions for it. This Activity and the subsequent two focus on a specific named campaign to accomplish something for the organization – to bolster its narrative (i.e., marketing-style campaigns), set conditions to transform the organization, address an emerging threat to the organization, leverage opportunities in the environment, or other purposes.

Activities Six through Eight represent three phases of the campaign's beginning – pre-launch, launch, and post launch. Most of the intellectual work should be done in pre-launch. Through the full understanding of the environment in the previous five Activities, planners should be well prepared to not only articulate the purpose of the campaign and key themes and messages but anticipate (to a degree) the types of barriers and resistance that the campaign may engender – whether directed at the organization or its leader, or both. Planners must understand the intended outcomes of the campaign that will include seeking to isolate both the opponents and their messages.

The importance of this last point cannot be overstated. Opponents will never be silenced and counternarratives can never be defeated. Instead, the goal is to prevent opponents and opposing messages from having influence over the organization by having stakeholders discredit them. If the stakeholder is an opponent, however, pre-launch planning becomes vital to determine how to influence the stakeholder within established protocols such that stakeholder decisions do not impede the organization's goal. In such cases, the campaign must arm the leader with the right messages to conduct negotiation with the stakeholder or otherwise allow the organization the freedom to act and promote its narrative while, to the maximum extent possible, also serve stakeholder interests.

So, the organization needs a campaign. What is it, and why? That's the purpose of this Activity.

The formative stages of a named campaign are critical, and it begins with an idea—maybe in the leader's mind or from a change agent inside the organization. Once that idea has been formed *and communicated to any other individual*, the seed of a new campaign is sown. But like many seeds in real life, they do not always grow into full-grown plants. Many are nipped in the bud, so to speak, or fail to germinate. Similarly, the person hearing of the initial idea may disagree with the leader or change agent, and nothing happens. But the idea rarely goes away, and the leader may wait until more information is available or conditions change before re-opening the idea to a more receptive organizational membership.

It is at this point where this Activity begins. In essence, Activity Five helps identify the ideas that may have formed in the minds of leader, while Activities One through Four identify those of potential change agents in the organization. Activity Six starts with the decision to move forward with the idea and turn it into reality, to get the organization to alter its communications – words, actions, attitudes, processes—to align with the idea. See Figure 8.[1]

But there's a translation process needed. Some ideas can become effective campaigns with total organizational participation. Others have to stay close-hold (i.e., restricted to only certain members of the organization and shielded from the rest) due to sensitivities surrounding the idea – hopefully these were identified in Activity Two. So, while the idea is being examined, analyzed, and converted into an actionable campaign, there are decisions needed regarding how the membership becomes engaged in the process of its development.

However, during pre-launch, the idea can always be withdrawn and the campaign stopped. *Launch*, which will be explored in Activity Seven, is the point of no return – when the leader has declared the campaign's beginning such that the membership is engaged (whether they wish to be or not) and the organization is responding. There are several steps in the pre-launch phase of the campaign: (1) identifying the purpose and

[1] Figure 8 is an original graphic by the author.

character of the campaign, (2) develop the initial vision for the campaign that includes desired changes in the environment, (3) develop and review the themes, messages, and corporate identity (symbols and key terms) for the campaign, and (4) establish the plan architecture.

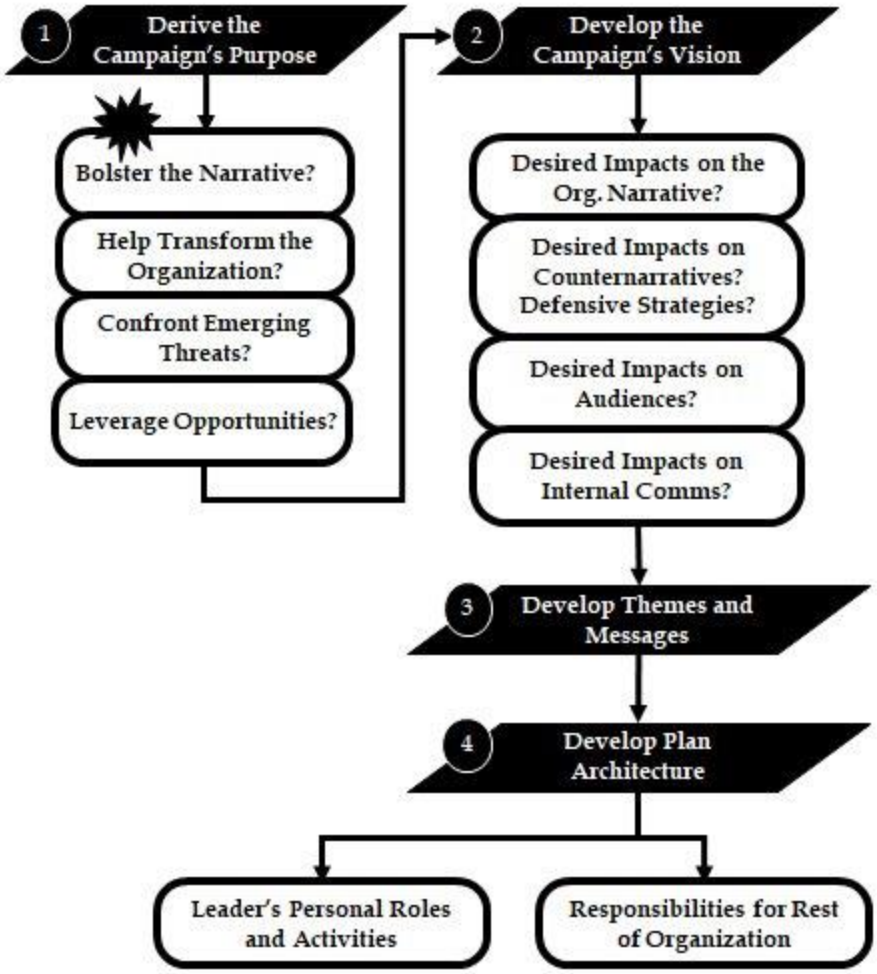

Figure 8. Developing the Named Campaign

It is important to note that each of these steps will feed off each other. Leaders must view this as an iterative, not sequential, process. In the end, at launch, the components of the campaign must be sufficiently stable. However, feedback and learning will continue throughout the life of the campaign. A campaign that fails to adapt is at risk of failing.

From Idea to Purpose

Communication campaigns begin with an idea. Something about the organization – its words, actions, self-concepts – requires change. The impetus for change can take several forms. Note that these are not mutually exclusive, nor should they be viewed as exhaustive.

Bolstering the Narrative

Perhaps the organization needs to *bolster its narrative*. The standing campaign has hit a barrier of some point and the narrative is no longer as effective as it once was. The competitive environment has changed such that the organization no longer holds the same advantage. Or the identity is flagging because of changes in membership who do not find the identity as salient or join for different reasons than veteran members. In any case, the failure to bolster the narrative could result in its further erosion, weakening the competition advantage and possibly presenting an existential threat to the organization.

Campaigns serving this purpose alone typically are *steady-state campaigns* that view the existing organizational narrative as adequate and no transformational change to the organization is required. While there may be transformational changes in terms of the capabilities or structures of the organization, the sense of identity and the desired image are essentially unchanged. The purpose is merely to ensure the continued competitive advantage of the organization through the course of the campaign. Many named campaigns will be steady-state.

Transforming the Organization

The opposite to the above is that the identity of the organization and its competitive advantage must change. What has defined the organization

to this point no longer holds. Transformational change is needed. Clearly, instances where the organization is forming or being disestablished are examples when this level of change is needed. In the general case, any current or pending loss of competitive advantage that no action by the organization could restore (at least within a reasonable timeframe) could require transformational change to correct. The rebuilding or restoration of competitive advantage mandates a change to the narrative.

Transformational campaigns do just that. They change the narrative of the organization and cause it to establish a new identity and image. The additional requirements for a transformational campaign are the development and utilization of counternarratives against the organization by its own leadership. In essence, the campaign encourages, perhaps requires, the organization to question itself and its own identity. This is not easy, as the members will not wish to do so and may find themselves losing commitment with the organization and departing if the campaign does not work properly. The pre-launch of transformational campaigns can be highly sensitive and premature knowledge of the campaign can spur resistance.

Confronting Emerging Threats

Organizations face many emerging threats but often can address them through campaigns that only must bolster the narrative. However, some threats may require more drastic action. Perhaps a new capability or organizational structure is needed that is disruptive to the organization, even though in the end the identity of the organization may not change much. Or, perhaps the organization must deliver a well-coordinated and consistent message to stakeholders and other audiences to mitigate the threat, challenge the new opponents, and re-shape the environment.

Campaigns may be built in multiple phases – the first being transformational to posture the organization to shape the environment in light of the threat, before stabilizing and reinforcing its original narrative. In effect, the purpose of the campaign is to change relationships in the environment in ways that support the organization's existing narrative.

Leveraging Opportunities

A fourth purpose is similar, but rather than the external environment posing a threat, the organization is instead looking for opportunities that foster promoting its narrative. Expansion of the organization is an example. There may be reasons to transform portions of the organization to encourage innovation and experimentation, which can then be shared with the rest of the organization. There is a degree of conservatism in that the organization tries to protect its existing narrative from undue change, and the campaign may either reinforce that conservatism—e.g., allow transformational change after significantly mitigating risk—or overcome it—e.g., remove existing organizational barriers to change (Activity Four). In essence, the campaign is not necessarily transforming the identity of the organization so much as changing its behavior.

Campaign Vision

As leader interventions of the organization's standing campaign, named campaigns are change efforts by definition. Change efforts require a change vision, a mental image of a desired future state, that allows members and stakeholders to understand what the leader wants to accomplish through the campaign. These should include how the standing campaign affected: (1) how will the narrative change; (2) how will the relationships between the organization and its members change; and (3) how will the organization changes the ways it ordinarily communicates.

Steady-state campaigns are likely to have visions only incrementally different from the current situation, with the organization taking steps to reaffirm its competitive advantage. Leaders should have little trouble explaining the vision to others, but the vision could have problems being accepted. First, it may lack novelty and therefore may not be inspiring. Audiences may view the vision as meaningless or boring. Second is the inverse, efforts to make it novel may overdo it, causing the vision and associated marketing materials to seem like all form and no substance. Some members may be inspired, but only for a short period. So long as the vision helps inform members and stakeholders of the need for a campaign and the

investment of organizational energy to sustain competitive advantage, these issues should not be much concern.

The vision for a transformational campaign differs substantially. Not only must it provide a description of the desired future state of the organization, it must convey distance from its current state. Resistance against the campaign and its vision is to be naturally expected as the campaign will include messages destined to disrupt the organization and posture it for change. Visions for transformational campaigns therefore do not have to be bullet proof, but it is important that they rationally and logically connect the current state to two arguments: (1) that transformation provides the best chance of success in reaching the desired state, and (2) failing to transform presents unacceptable risk of reaching an undesirable future where the organization's competitive advantage is eroded.

Leaders have several pitfalls to avoid with their transformational visions. First, it must clearly explain the desired future state. In this activity book, it is better to develop vision statements that describe how the organization looks and behaves – a *vision of action* – rather than a (typically bland) description of what the organization is – an *end-state.* Visions of action will make it easier for members to see themselves in the new transformed organization, and may encourage greater member participation. End-states are at greater risk of being perceived as the leader's personal vision, disconnected from the members and not aligned with the member's experience in the organization. Two other pitfalls to avoid include a vision that is (1) inflexible, which risks being negated as circumstances change during the campaign, and (2) includes too much jargon or specific language that requires added expectation. The vision must be as self-contained as possible so that members will share the vision with each other without the need of added explanation.

Themes of …	Function(s)	Description	Desired Effects
Excellence	Promote	Celebrates identity Promotes competitive advantage (current and future)	Member commitment increased Stakeholders convinced of org.'s value
Stability	Defend	Discredits charges of complacency and risk aversion Presents organization's strengths, resilience, camaraderie, reliability	As above, plus… Counternarratives isolated and abandoned
Constantly Improving	Defend & Adapt	Emphasizes learning and innovation, embracing new ideas Discredits charges of complacency and risk aversion	As above, plus… Stakeholders support improvement efforts
Correcting Problems	Adapt & Target	Acknowledges criticisms Shows understanding of environment Demonstrates validity of corrective efforts	As above, plus… Corrective efforts done on organization's terms

Figure 9. Suggested Themes for Steady-State Campaigns (Identity does not Change)

Themes, Messages, & Corporate Identity

Whereas the *campaign vision* applies for the whole campaign and all internal and external audiences, *themes and messages* are more focused. Themes are intended to convey the vision across multiple audiences and collectively should lead to accomplishment of the vision. Messages are nested under one or more theme and reflect what members of the organization wish to communicate directly to one or more audiences. Thus, when preparing a specific communication activity such as a speech or military exercise, the messages should directly translate into the content of those activities – the words included in

the speech or the ideas driving the purpose and conduct of the exercise.

Developing themes and messages is an art. Given the campaign vision, how does a planner divide it into usable themes for delivery to broad audiences, and further divide the themes into tailorable messages for delivery? There is no prescribed way to divide a vision into component parts – it depends greatly on the organization and its leaders. However, transformational campaigns will require a larger portfolio of themes and messages than steady-state campaigns (see Figure 9 and Figure 10[2]).

- *Stability* – Themes that defend the narrative by highlighting what will remain constant in the campaign.
- *Learning* – Themes that defend and adapt the narrative by highlighting how the campaign will encourage the organization to continuously improve and sustain its competitive advantage.
- *Fixing Problems* – Themes that defend and adapt the narrative and target opponents by highlighting how the organization is responding to external criticism.

Themes of …	Function(s)	Description	Desired Effects
Urgency for Change	Target (Internal)	Presents impetus for change Explains undesired future state Explains risks of insufficient change	Members and Stakeholders aware of need to change & reject status quo
Benefits of Change	Promote	Presents desired future state Presents improved or sustained competitive advantage	As above, plus… Members and Stakeholders accept change effort
Countering Resistance	Target	Addresses arguments to avoid or defer change Addresses risks of lack of priority for change Addresses attempts to interfere with change	As above, plus… Opposition to change muted Change effort supported
Countering Ambivalence	Promote & Defend	Addresses conflicted feelings & anxiety over change Addresses disagreements over the change effort approach Addresses concerns change effort does not go far enough	As above, plus… Change effort understood Discomfort with transition overcome Acceptance of desired future state
Overcoming Cynicism Toward Change	Defend & Target	Counteracts antipathy toward change ("It's going to fail" or "Didn't work before, won't now") Addresses unwarranted withholding of resources and support	Angst over change overcome Change effort supported (or barriers to change removed)

Figure 10. Additional Themes and Messages for Transformational Campaigns (Identity will Change)

Steady-state campaigns should include the following ideas as possible sources for themes:

- *Excellence* – Themes that promote the narrative by highlighting the organization's strong points and reinforcing its competitive advantage.

Transformational campaigns also may use the above ideas and *add* the following:

- *Urgency* – Themes that target the organization's own narrative and warn against the potential for loss of competitive advantage. Also targets

[2] Figure 9 and Figure 10 are original graphics by the author.

against the setting of complacency and loss of momentum as the campaign continues after launch.

- *Benefits of Change* – Themes that promote the campaign vision and encourage members to accept and embrace the change in the organization's narrative. Also includes themes that prepare the organization to celebrate progress.
- *Targeting Resistance* – Themes that defend the campaign vision and target resistors to change and their counternarratives against the campaign. The aim is to isolate such opponents from the campaign.
- *Overcoming Ambivalence* – Themes that promote the campaign vision for audiences who are undecided, uncommitted, avoiding involvement, or otherwise disinterested to increase involvement and engagement in the campaign.
- *Making the Transition* – Themes that prepare members and stakeholders for uncertainty and other emotional responses that arise when dispensing with the old ways while the new ways are still forming.

It is important to 'red-team' (e.g., test and validate) the themes and messages to ensure their collective internal consistency and sufficiency to meet the campaign vision. Planners should look for potential gaps and inconsistencies among messages, ways they can be subverted by opponents and used against the organization and its leaders, and the extent to which the messages can spread among audiences without losing or changing meaning.

Finally, the *corporate identity* of the campaign should be considered. What will the campaign be called? What symbols (e.g., logos, catchphrases, etc.) will help market the campaign, draw attention to it? How will the symbols help convey the presence of the campaign and/or specific themes and messages to internal and external audiences? These symbols should also be red-teamed to ensure consistency with the campaign vision and general acceptance of them representing the campaign. This is especially important in transformational campaigns where symbols may signal intended changes in the organization's standing narrative, which in turn may generate immediate resistance from members. Generating resistance is not necessarily bad, so long as the campaign accounts for such initial reactions and has the requisite themes and messages prepared to respond to those reacitons.

Campaign Architecture

Once the themes and messages are determined, the next important step is developing the strategy and plan for launch. The essential questions at this point are three-fold. First, what is the leader's personal role in the campaign? Second, who will be the campaign's proponents and what are their roles in developing and coordinating activities and monitoring progress? Third, what is the division of responsibilities among the organization and types of activities that will dominate the campaign? Some campaigns will follow the chain of command and be conducted at echelon, while others may be centralized focused around subject matter experts in a proponent organization. Still others may rely on mass communication. Each of these represent entirely different options regarding how the campaign is organized.

Role of the Leader

It is important that planners know enough about the leader's planned role to prevent gaps and inconsistencies from appearing elsewhere in the campaign. It is also possible for the leader's other professional commitments to divert energy away from the campaign, so planners should consider what the leader is personally committed to saying and doing and what words and actions may have to be delegated to others.

The first question to ask is *what will be the leader's public role in the campaign?* One can consider three possibilities based on the leader's professional campaign constructed in Activity Five and the leader's direct communications with the planners. The options are:

- *Organization-first* – It is the organization that is the public face of the campaign, with the leader eschewing the spotlight and staying in the background. One is

likely to see this in steady-state campaigns as the leader's personal involvement may not be as important. The spotlight of such campaigns may instead be placed on members (e.g., soldiers) or contexts (e.g., situations or locations).

- *Leader-first* – It is the leader that serves as the public face of the campaign. Transformational campaigns might be leader-first due to the need for the leader to personally express themes and messages calling for change and explaining the vision.
- *Campaign-first* -- The campaign tries to sell itself separately from the leader and the organization, with the leader's intent is expressed indirectly. Campaigns emphasizing defensive communications (often steady-state) may function this way, as the campaign draws attention away from the leader and organization. Transformational campaigns may also be campaign first if the initial desire to shield a majority of the organization from the change effort, such as those involving experimentation or other discrete activities not affecting the membership writ large.

Planners should capture what activities that the leader will personally undertake. Clearly, leader-first campaigns will require the leader to conduct more direct communications with audiences, whereas the leader may have little to no direct involvement in the other two after launch. From this, leaders should decide which themes and messages will dominate their personal communications, while the remaining themes and messages are left to the organization.

Proponency

The proponent of the campaign is a suborganization with direct oversight of the campaign. In military organizations, the proponent is normally the staff directorate with the functional expertise that most closely aligns with the campaign's purpose and vision. The proponent's function can vary from being very hands-on—directing and controlling the messages being delivered and directly monitoring the impact and measures of progress—or more hands-off, in which the activities of the organization are delegated more to the members. Campaigns driven through chains of command will see less direct involvement by the proponent.

Regardless of hands-on or hands-off (and everything in between), proponents need clear rules of engagement regarding what authorities and responsibilities they have for the campaign vice what is delegated to line units. The more hands-on the proponent, the more likely that the campaign will incur tensions with line units. Consideration should be given to messages that reassure the chain of command that the proponent's role is in ultimately in support of commanders. Instances where the proponent is required by the campaign to exercise greater than usual levels of control over what would be commanders' authorities and responsibilities, additional messages should be crafted to justify and explain the proponent's added roles.

Another consideration is the extent to which the proponent will also serve as campaign spokesperson on behalf of the leader. This is likely for campaigns where the proponent serves as the primary functional expert and the leader takes a campaign-first approach (e.g., how a service J-1 may serve as spokesperson for any campaign related to human resource management or administration on behalf of the service, with the service chief making only occasional statements on behalf of the campaign). In cases where the proponent will serve as spokesperson, planners should identify themes and messages specific to the proponent, just as for the leader.

Division of Responsibilities

Subordinate leaders and members need shared understandings of what the current messages are, who is responsible for developing and providing them, and how or where questions, issues, and concerns about the messages should be raised. Some campaigns will rely on the chains of command as the primary conduit for information flow, even when it is leader-first. The more complicated the campaign – that is, a campaign that is very broad in scope and has many themes and messages aimed at

different audiences – the more likely that chains of command will play important roles. Naturally, the purpose and vision will determine responsibilities among operational or unit leaders and institutional or garrison leaders. For example, sexual harassment and assault response campaigns establish different but complementary themes and messages for organizational commanders and garrison coordinators and their offices. In contrast, campaigns that are narrower in focus may rely on the proponent and its functional organizations for most information flow and activity, while units may only need to be aware and assist members in reaching the points of contact.

Another consideration is the extent to which the communication campaign is tied to a specific on-going change effort. The division of responsibilities may not necessarily follow the lines of effort in the change. For example, the change effort may allow autonomy to the different organizations to achieve goals and objectives for that line. However, messaging in the campaign may need to be centralized with the proponent. Planners must consider how best to align activities of the change effort and the messaging of the communication campaign.

Structure of the Activity

This Activity presents the above four steps in sequence, however planners should consider all four as interdependent. It is recommended that the entire Activity be laid out like a blanket with all steps visible at once. Planners then start with the activities of which the information is best known or easiest to answer, moving around the steps as needed and adjusting each step in kind. Clearly, the intent is to fill out the entire Activity, thereby providing adequate information to begin launch planning (Activity Seven).

Conduct of Activity Six: Developing the Named Campaign

For the short form of this activity, complete items marked with a star (★) – steps 1, 2a, 3a, 3b OR 3c, and 4b..

★ 1. State the Purpose of the Campaign:

In the space below, describe the purpose of the campaign. Use the following to help spur ideas on how to construct the purpose statement:

- *Bolstering the Narrative* – Review aspects of the standing narrative (Activity One) that are at risk or need bolstering for the organization to sustain competitive advantage. Also review the internal communication processes (Activity Four) for possible vulnerabilities or poor performance that require reinforcement through the campaign.
- *Transforming the Organization* – Review aspects of the standing narrative (Activity One) and criticisms against the organization (Activity Two) that suggest the need to change the narrative. Describe what within the narrative requires change and why, and how the campaign would in turn respond to (ultimately weaken) counternarratives.
- *Confronting Emerging Threats* – Review the audiences of the standing campaign (Activity Three) and identify those who constitute a novel or strengthened threat to the organizational narrative. Consider how the campaign will deter the threat and opposing messages (Activity Two) while assuring stakeholders of the organization's narrative and adjusting internal processes (Activity Four) to sustain a lasting response to the threat should it remain or return.
- *Levering Opportunities* – Review aspects of the environment (Activities Two and Three) that present possible opportunities for the organization to uniquely exploit. How so?

2. Develop the Campaign Vision:

The following questions will help identify specific outcomes of the campaign based on specific changes to the standing campaign. The purpose will clearly drive some of the desired outcomes, but the converse is also true as identifying outcomes may help clarify the purpose.

★ 2.a. Review each of the major components of the standing campaign (Activities One through Four) and identify specific changes needed that the campaign must (or at least should) accomplish.

- Changes to the organization's narrative. What of the organization's identity (central character, distinctiveness, historical continuity) must change as a result of this campaign? What of the organization's image and reputation (expressions of competitive advantage) must change?

- Changes to the counternarratives and the organization's defensive narrative against them. What counternarratives against the organization's standing campaign are most relevant? What must the campaign do to reduce their effectiveness? How must the organization's defense strategy change to accomplish this?

- List audiences (especially of the standing campaign) who the organization must engage as a part of the campaign. Characterize the relationship with that audience and how the campaign must change it (e.g., causing an opponent to elect not to further communicate their opposition, causing a neutral party to become supportive of the campaign).

- For the campaign to achieve its purpose, list changes to the organization's internal communication processes and habits that the campaign must either (a) leverage intensively or (b) change. What are ways to accomplish this?

2.b. Consolidate all the above points to produce a *campaign vision* that explains the overall desired outcomes and how the campaign will achieve them. Be sure to update the entries in steps 1 and 2a to match the below, as needed.

3. Develop Themes, Messages, & Corporate Identity of the Campaign:

★ 3.a. What is the character of this campaign? Circle one -- Steady-State Transformational

If steady-state, do step 3b below. If transformational, do both steps 3b and 3c. Proceed then to step 3d.

For the short form of this step, if transformational then ONLY do 3c. Scan 3b for additional ideas.

★ 3.b. *For both types of campaigns,* identify major themes and message of the campaign based on step 2b. These will be broad and impact multiple audiences listed in step 2a. Use the following categories of themes as an initial guide (they are not all-inclusive nor mutually-exclusive, nor do they all have to be used):

- *Excellence* – Themes that promote the narrative by highlighting the organization's strong points and reinforcing its competitive advantage.
- *Stability* – Themes that defend the narrative by highlighting what will remain constant in the campaign.
- *Learning* – Themes that defend and adapt the narrative by highlighting how the campaign will encourage the organization to continuously improve and sustain its competitive advantage.
- *Fixing Problems* – Themes that defend and adapt the narrative and target opponents by highlighting how the organization is responding to external criticism.

Theme: _____

Messages (and primary audiences):

Theme: _____

Messages (and primary audiences):

Theme: _____

Messages (and primary audiences):

Theme: _____

Messages (and primary audiences):

Theme: _____

Messages (and primary audiences):

Theme: _____

Messages (and primary audiences):

★ c. *Fortransformational campaigns only,* identify additional major themes and message of the campaign based on step 2b. These will be broad and impact multiple audiences listed in step 2a. Use the following categories of themes as an initial guide (they are not all-inclusive nor mutually-exclusive, nor do they all have to be used):

- *Urgency* – Themes that target the organization's own narrative and warn against the potential for loss of competitive advantage. Also targets against the setting of complacency and loss of momentum as the campaign continues after launch.
- *Benefits of Change* – Themes that promote the campaign vision and encourage members to accept and embrace the change in the organization's narrative. Also includes themes that prepare the organization to celebrate progress.
- *Targeting Resistance* – Themes that defend the campaign vision and target resistors to change and their counternarratives against the campaign. The aim is to isolate such opponents from the campaign.
- *Overcoming Ambivalence* – Themes that promote the campaign vision for audiences who are undecided, uncommitted, avoiding involvement, or otherwise disinterested to increase involvement and engagement in the campaign.
- *Making the Transition* – Themes that prepare members and stakeholders for uncertainty and other emotional responses that arise when dispensing with the old ways while the new ways are still forming.

Theme: _____

Messages (and primary audiences):

Theme: _____

Messages (and primary audiences):

Theme: _____

Messages (and primary audiences):

Theme: _____

Messages (and primary audiences):

Theme: _____

Messages (and primary audiences):

Theme: _____

Messages (and primary audiences):

3.d. Establish the corporate identity of the campaign. In the space below, identify potential logos, slogans, and other symbols that will represent the campaign to audiences – or provide notes and ideas to provide to external firms or organizations developing these symbols.

- Uses for the corporate identity. How will the logo, slogan, and other symbols be used to support the campaign? What meaning should it convey?

- Logo ideas or concepts and the intended meaning:

Intended Meaning: _____ _____ _____	*Intended Meaning:* _____ _____ _____

- Slogan or other symbols -- ideas for development and intended meaning:

4. Establish the Campaign Architecture – Role of the Leader:

This step addresses divisions of responsibilities among the leader, the designated proponent, and the remainder of the organization to implement the campaign. The answers to these questions should help guide the development of the final campaign plans.

4.a. Identify the personal roles of the leader in the campaign. Which of the following best describe the way the leader envisions the campaign being implemented (circle one)

- *Leader-first* – It is the leader that serves as the public face of the campaign.
- *Organization-first* – It is the organization or its members that is the public face of the campaign, with the leader being less visible
- *Campaign-first* – The corporate identity of the campaign serves as the public fact, with leaders or members being included or not.

★ 4.b. Describe the leader's intent for the campaign implementation. What does a well-executed campaign look like from the audience's perspective?

4.c. Which themes and messages from step 3 will the leader *personally* want to deliver and why? Assume the remainder would be delegated.

4.d. Which types of activities will the leader wish to perform *personally* to deliver messages of the campaign? What types of activities would the leader prefer to delegate?

4.e. Identify the staff proponent for the campaign: _____

- What are the responsibilities of the proponent in support of the campaign (circle all that apply):
  (1) *Develops messages* (2) *Organizational spokesperson* (3) *Primary point of contact for inquiries*
  (4) *Gathers data, monitors and reports progress* (5) *Manages rules of engagement for campaign*
- Describe these responsibilities and how it supports the organization's subordinate commands:

4.f. Identify the roles and responsibilities of line organizations (e.g., subordinate commands)

- What responsibilities do these organizations have in support of the campaign (circle all that apply):
  (1) *Develops messages* (2) *Organizational spokesperson* (3) *Primary point of contact for inquiries*
  (4) *Gathers data, monitors and reports progress* (5) *Manages rules of engagement for campaign*
- Describe these responsibilities and how it supports the campaign and/or the proponent:

Activity Seven: Develop the Launch Plan

The next set of activities take the themes, messages, and corporate identity and operationalizes them into plans of action during the pre-launch and launch periods. The pre-launch phase of the campaign includes actions that pre-position the themes and messages in the minds of key friendly audiences, especially stakeholders. This will provide important feedback to help adapt the narrative, themes, messages, corporate identity, and other elements prior to launch. Pre-launch also includes 'trail balloons,' the release of possibly controversial messages to a limited audience for the expressed purpose of gauging reactions from other audiences. These are helpful for shaping the message before it is released wider as an official communication.

There are five steps in this Activity. Note that all the work is done pre-launch. Although the launch phase will bring along its own requirements for feedback and adjustments, the planning for acquiring that feedback is done in advance. In practice, the campaign's launch constitutes a complex and carefully controlled sequence of activities. Once the launch starts, it cannot be stopped. Therefore, planning includes ensuring the most favorable conditions possible for launch.

The formative stages of a named campaign are critical, and it begins with an idea—maybe in the leader's mind or from a change agent inside the organization. Once that idea has been formed and communicated to any other individual, the seed of a new campaign is sown. But like many seeds in real life, they do not always grow into full-grown plants. Many are nipped in the bud, so to speak. Those that garner leader support and are developed into plans for a communication campaign can still be stopped without significantly altering the organizational context. This is what separates the 'pre-launch' phase from 'launch' – anything stopped during pre-launch means sustainment of the organization's status quo. However, once a campaign is launched—meaning that it has begun implementation—there is no turning back. Thus, properly planning the launch is essentially for setting conditions to allow the communication campaign the best chances of succeeding.

Launch is an artificial concept, referring to a series of events that unequivocally announce initiation of the campaign. Note that the definition given is not a single event. While many campaigns are launched when the leader delivers a signifying speech, cuts the ribbon, unveils the logo, or makes available the marketing materials, such an action is always accompanied by other actions designed to spread the word or demonstrate the campaign's beginning. *One should not think of launch as a discrete event so much as a phase of activity.*

One must also guard against the idea that the seminal launch event is the only way a campaign's launch phase begins. Direction to implement can come in a staff meeting

A successful launch requires significant pre-launch planning after the building blocks of the campaign plan are established (Activity Six) and the leader is satisfied that the campaign is ready to be launched. The purpose of this Activity is to help plan the launch, including: (1) determining the conditions and parameters for launch, (2) mapping out and planning the launch events, (3) pre-positioning the messages, and (4) developing measures of performance to determine the near-term effects of the campaign. Note step (3) which is vital to the success of the launch. It includes mitigating resistance and preventing too many people getting involved in the planning. While the cohort of planners and implementers may expand as launch approaches, there is risk in losing control of the messages.

Step (5) in this Activity is the *go-no go* decision, which is when the leader implements the launch. This is equivalent to *crossing* the line of departure, not the leader voicing such as decision. As with a military campaign, the leader can always reverse course prior to the crossing. The leader can stop the launch, delay it, or cancel the campaign altogether *before the first launch event occurs*. After that point, however, the campaign's implementation has begun and it will require significant organizational energy, potentially even a second campaign, to stop it.

Setting Launch Parameters

The launch parameters are those conditions, factors, or drivers that determine when and how it is best to launch the campaign. Three parameters are suggested: (1) *Go* conditions which are either time-driven or event-driven, (2) whether the launch should be broad or limited in scope, and (3) *No-Go* conditions that incur requirements to delay, cancel, or substantively modify the campaign (see Figure 11[1]).

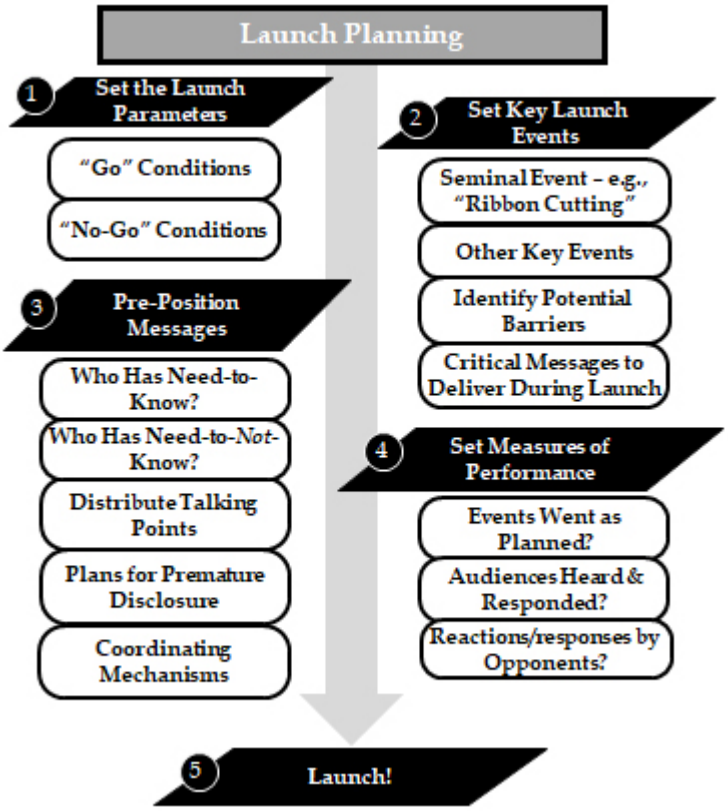

Figure 11. Planning for Launch

"Go" Conditions -- Time vs. Event-Driven

The first parameter concerns how the timing of the launch is determined by the leader. The below is based on work in organizational development on pacing strategic change.[2] The two choices below not only can govern the launch but also many post-launch activities and phases (see Activity Eight).

Decisions for launch can take two forms – time-driven and event-driven. *Time-driven launches* are set to fixed dates on the calendar. The fixed date can be determined in many ways but is often tied to an external condition that the organization either does not control or must leverage. For example, at the enterprise level, launches might be based on the fiscal year to leverage the budgetary situation. Sometimes campaigns are time-driven based on the tenure of a senior leader or stakeholder who desires to have the campaign underway before handing the reins to a successor.

Time-driven launches are simpler as they establish clear deadlines for launch planning. This is beneficial when launch involves a large commitment by organizational members whose actions must be carefully coordinated for maximum effect. However, this also involves matching the organization's actions with the audience's schedule. Launch activities must shape the environment so that audiences, especially stakeholders, are sufficiently prepped to perceive and respond to the launch when it occurs.

Event-driven launches are conditions-based. Once pre-determined desirable conditions have been verified in the environment, launch occurs as soon as practical. Or, if the campaign is the result of a crisis, the conditions may already have been met and thus launch would occur as soon as possible. There can be greater flexibility in event-driven launches for leaders to delay if the conditions are not right – for example. socialization is incomplete, certain barriers to communication are not yet lifted, or if the external environment becomes less certain.

Event-driven launches are better for smaller-scope launches, such as when a leader directs implementation extemporaneously, or when the organization has limited control over the environment. In some instances, conditions demand that the leader launch the campaign prior to the completion of launch planning. In

[1] Figure 11 is an original graphic by the author.

[2] Gersick (1994).

such cases, the organization proceeds with the remaining launch planning and implementation as quickly as possible. Launch therefore becomes more of an emergent activity as the organization exercises actions to disseminate messages and measure their performance.

Launch Scope

In military organizations, many campaigns involve the careful control of launch information to mitigate premature dissemination which could create confusion and resistance against the campaign. Scoping the launch takes two forms: (1) who is involved, and (2) what caveats are used to protect information. Determining *who* is involved relies on common practices regarding information security and need-to-know.

The use of caveats or other control measures allow for differentiating what is valid and official from what is still to be considered in draft form. A common practice is to mark campaign-related information as explicitly *draft* or *pre-decisional* until validated by a leader. Version control is also important and protocols for identifying the most current and accurate draft information are necessary as the dissemination of such materials will be asynchronous. Elements of a version control plan can include the standardized use of version numbers, *as of* dates, file names, and use of shared drives or platforms/dissemination through e-mail. While it is naturally preferred to use existing organizational practices where possible, they may not exist or be applicable for the named campaign in question.

"No-Go" Conditions

No-Go conditions could be but are not necessarily the opposite of the Go conditions. Planners should identify conditions internal or external to the organization that necessitate the cessation of current campaign planning and either a delay, cancellation, or substantive modification to the campaign. It is not necessary to construct an exhaustive list – for example, one can assume that an intractable crisis would disrupt the campaign, so there is no need to attempt to list them. Rather, No-Go conditions should express factors that could plausibly arise in the environment that would present a significant risk to the campaign as devised and force the leader to make a decision about proceeding.

An example of such a No-Go condition is the denial of vital anticipated resources due to a stakeholder decision. Based on the conditions present, the leader could continue the campaign while adding messages calling for the restoration of those resources, stopping or delaying the campaign until an alternate plan is constructing, or scuttling the campaign altogether. If known, articulating No-Go conditions could include possible decision scenarios. However, these should not be binding. The circumstances by which the No-Go condition appears will drive the leader's decision.

Planning Launch Events

Viewing the launch as a phase means that launch is effectively a mini-campaign unto itself whose purpose is to the disseminate the messages so they, in effect, spread themselves without constant intervention by the organization. In other words, launch is when the organization is doing all the disseminating. Post-launch occurs is the organization steps back and relies on its routine activities to reinforce the message. There are several questions to answer, and these will co-evolve: (a) what are the key events in the phase, including if there is one or more *seminal event*, (b) how long will it take to accomplish all the events, (c) what are the talking points or vignettes associated with message delivery for these events, and (d) what does the organization do if information about the campaign is exposed prematurely due to leaks?

"Seminal" Events and Others

The seminal event (or events) is a specific activity that provides the most public signal that launch is occurring. This typically includes symbolic actions such as leader speeches, ribbon cuttings, unveilings (including unfurling of a new organizational flag or guidon), and other types of ceremony. However, this need not be the first launch event. For example, stakeholder engagement may be necessary prior to the seminal event to set conditions for acceptance of the campaign. This engagement *is part of launch* if it sets expectations that the organization will follow-through with launch implementation, and

failure to follow-through could harm the relationship with the stakeholder.

Other events taking place during this phase should be identified and planned to ensure outreach to all desired audiences—friends, opponents, and neutral parties. They may include, but are not limited to, engagement activities by leaders or members either in-person or remotely, training or operations demonstrating the campaign, staff meetings or actions routinizing the campaign in the organization, and media engagement.

Timing and Sequencing Events

The time required for conduct the launch phase is determined by some conditions in the environment:

- *Which audiences must be engaged and how long will it take to engage them at the appropriate level?* Stakeholders will tend to expect direct engagement by the leadership team, if not the leader personally. Other audiences are ok with virtual engagement or spokespersons. Some audiences will be swayed more by organizational activities than speeches or presentations.
- *What is the sequencing of these events?* Some events will necessarily follow others due to limits on resources and organizational energy. The schedule must accommodate these limits and minimize risk due to overusing equipment or overworking key personnel. Cost will also be a factor.
- *Will some audiences require multiple engagements?* Communication is not always a one-time affair. Some audiences, especially stakeholders, may require a series of engagements to ensure depth of understanding of the campaign's purpose and outcomes. Also, leader engagements may need to be followed or coupled with member engagements at the staff level.
- *What is necessary to mitigate barriers to the campaign?* If an opponent has influence over the organization or a key stakeholder, the launch phase must include events designed to defend the organization and the campaign against such opposition. Actions demonstrating the value of the campaign can be directed at such opponents to disprove their messaging.

Messaging Aids – Talking Points & Vignettes

Planners must properly plan the messaging associated with launch events so members involved are aware of the intended messages to be delivered. Two common ways of doing this are through *talking points* and *vignettes.*

Talking points are usually easy to generate. They are lists of discrete bullet points or passages representing the messages to be delivered. Conditions and leader direction may determine the extent to which the wording of the talking points are prescribed – that is, whether members must deliver the talking points verbatim or are allowed to vary in content while staying consistent with the point's intent.

Vignettes help members be consistent by synthesizing multiple messages into logical, coherent communications. These are useful for harmonizing actions with the messages of a campaign, such as explaining how a training exercise or humanitarian action demonstrate the broader intentions of the organization. Vignettes are not complete stories but provide connections among the organization, the activity, and the audiences (present or virtual) witnessing the action.

Clearly, the duration of the launch phase may expand in implementation. Delays in any sequenced event can have an impact on the rest of the schedule. Planners should provide maximum flexibility, while subordinate leaders should be given sufficient autonomy to leverage opportunities or plug scheduling gaps. However, senior leaders must maintain adequate control to ensure lower-level initiatives avoid creating inconsistencies in the messaging.

Plans for Premature or Erroneous Disclosure

Given the potential complexity of these campaigns, planners must brace for errors in launch planning, information leaks, and other mishaps that expose the campaign prematurely. If the opposition is able to seize the initiative and

besiege the organization with opposing messages, that may constitute a No-Go condition. Regardless, the organization's response needs to be carefully coordinated in advance. The following are options for such a response.

- *Categorical Denial*, whereby any leakage of information about the campaign is simply denied as non-factual. This carries the risk of being proven false should the same information be released as truth during launch.
- *Pre-Decisional Claims*, whereby leakages are simply premature, that the organization is 'looking at the situation' and the information has not yet been socialized.
- *Mitigation*, for leakages that are significant and too plausible to deny. The organization acknowledges the relevance of the leak and re-directs attention to something thing.
- *Accommodation*, if the leak means that the launch plan must change, such as immediately to make the most of the attention now drawn to the campaign.

Message Pre-Positioning Plan

The message prepositioning plan answers the following questions:

- Who needs to know what now or before launch?
- Who needs not to know about the campaign now or before launch?
- What information must be provided to those responsible for promulgating launch messages?

Once launch planning has begun, it is likely that actors in the environment already know the organization is up to something. The stimulus driving the campaign is likely known by others, who will try to guess what is going on. Opponents may leverage such perceptions to renew its attacks on the organization by rumors and disinformation. Therefore, message prepositioning may involve greater degrees of control than will be present during the rest of the campaign. The goal is pre-positioning of the messages, such that they are delivered in synchronized fashion for maximum effect on the environment according to the launch plan.

Who Needs to Know?

The answer to this launch is straightforward. Any member of the organization with a role to play in any of the launch events must have adequate information about the campaign to conduct messaging. Members must be made aware of any sensitivities or controversies regarding the messages so they will be prepared if opponents intervene during launch.

Also, primary stakeholders should know about the campaign if it in any way influences the relationship with the stakeholder. Stakeholder surprise is rarely desirable when launching a new campaign, even for purely internal ones as in some instances members opposing the campaign may communicate their opposition outside organizational channels.

Who Needs Not to Know?

This is a different question than who does not need to know, which helps preclude premature or uncontrolled dissemination. Launch information should be explicitly withheld from opponents who can mobilize opposition to the campaign before it launches. It must also be withheld from audiences who might be heavily influenced by such opponents.

Distributing the Messages

The need-to-know and not-to-know lists feed the message prepositioning activities. Each launch event has a *primary messenger* identified who is the member in charge of the event or serving as the organization's lead spokesperson. Planners must provide the primary messenger with the key messages (talking points and stories) and intended audiences, plus guidance on delivering messages both to those present at the event and reachable virtually through live streaming or video recording as applicable. Primary messenger must also have sufficient information to counter possible opposing messages delivered by others during or associated with the event.

Measures of Performance

At launch, the organization is largely concerned with questions regarding how well the various activities succeeding in getting the campaign off to a good start. The organization may ask: (1) did the organization say and do what it intended, (2) were they received by the intended audiences, and (3) do audiences seem to understand the messages as we intended? The challenge is to avoid answering these questions tactically and elevate the responses to the strategic level, which necessitates adding other questions. The preferred questions regard the responses by stakeholders, responses by opponents, the manner of the message's spreading outside of organizational control, responses by members of the organization, and the organization's handling of errors and misstatements in implementation.

The first three are straightforward and the desired measures at launch should not be too lofty. For stakeholders, the goals at launch could be limited to their knowledge that the campaign is taking place and that they either endorse or do not oppose it. It is also possible that the opposition becoming active indicates a successful launch. The needs to measure how the message spreads is also important. Any evidence that the message is being spread by external actors without substantive modification is evidence of a successful launch. Leaders and planners should monitor the environment for evidence of modifications to the message appearing due to misunderstanding or misinformation and issuing corrective messages as appropriate. Evidence can include social media use and other external means, or changes in the engagement between external audiences and organizational members, such as desires for follow-on outreach.

The fourth is also important as it measures how committed members are to the campaign and how differently members feel committed to the organization as a result. If the internal response is lukewarm or negative, internal messaging may be needed to reinforce the campaign and defend it against emergent opposition. As much as possible, leaders and planners should identify in advance how different perspectives in the organization (Activity Four) may lead to dissent or lack of commitment by the organization.

Finally, the organization's capability and capacity to deal with its own mistakes must be measured. Leaders and planners should measure how closely the organization's response to its own errors mirror the planned responses to premature or erroneous disclosure in the previous steps. How well did the organization follow its own playbook? How successful was the response in mitigating potential harm to the campaign? How well did the organization adapt its campaign to any new realities caused by the error or premature release?

Final "Go" Decision

At the point when the first launch event is to occur (whether time- or event-driven), leaders should review the launch plan and make final adjustments. In particular, if there are any components of the launch plan that are incomplete at the time when the organization is compelled to launch the campaign, the risks of proceeding must be articulated and mitigated. In some cases, it may be necessary to complete planning during implementation (in essence, following the metaphor of *flying the plane while building it*). Regardless, the initiation of launch is a decision that cannot be reversed – cancelling a poorly launched campaign constitutes a separate decision, in effect a separate campaign.

Structure of This Activity

This Activity follows these five steps in sequence. Each step is presented as an overarching set of actions rather than a detailed checklist covering every contingency expressed in this text. The context surrounding each named campaign is too different to make this Activity prescriptive. Therefore, the goal is not to produce a plan so much as the guidance that will facilitate detailed planning within the organization.

As with Activity Six, many of these steps are interdependent. It may be best to lay out all pages of the Activity like a placemat and answer the questions as information is available. These answers may spur ideas applicable in any other part of the Activity.

Conduct of Activity Seven: Developing the Launch Plan

For the short form of this activity, complete items marked with a star (★) – steps 1a, 2a, 2e, 3d, and 4b-c.

★ 1. Setting the Launch Parameters:

This step in the Activity allows you to identify the *Go* and *No-Go* conditions for launch, along with the scope of the launch plan – how broadly will it promulgate the initial messages. *Seminal launch event* refers to a single event that unveils the campaign. This date may drive requirements to engage with stakeholders or select audiences in advance, which would constitute the actual beginning of the launch phase.

★ 1.a. Identify the *Go* conditions – *circle one of the following* and provide specifics below. Also, what is the expected duration of the launch phase?

- *Time-driven* – The seminal launch event is set to a fixed date on the calendar. *Go* conditions constitute what must be satisfied to meet this deadline.
- *Event-driven* – Launch begins only when certain conditions exist in the environment. *Go* conditions include indicators and evidence that help leaders identify when launch can proceed.

1.b. Identify the campaign's scope. Who is involved in the launch plan? What protocols will be used protect sensitive information about the campaign and manage version control over that information?

1.c. Identify the *No-Go* conditions – what conditions necessitate decisions to delay, cancel, or rework the campaign and how these conditions would be identified.

2. Plan the Launch Events:

This step in the Activity allows you to map out the major events in the launch phase. You will begin by identifying the *seminal launch events*, activities that send clear (often public) signals that the campaign is underway. You will then list activities that must precede the seminal event (which therefore actually begin the launch phase) followed by reinforcing activities that pursue the message.

★ 2.a. Describe the *seminal launch events* (there will ordinarily be one). Include the following:

- Key participants – leaders, special guests, etc. and why they are needed
- Setting – choices of venue, audience present (size and composition) and remote, and why
- Messaging – what the event will convey to the audiences present and remote
- Symbols – speeches, ribbon cuttings, flag ceremonies, etc. and what they will represent

2.b. Describe launch activities that must occur prior to the seminal event. Examples include private engagements with stakeholders or select audiences and organizational activities that will provide essential support for seminal event messaging.

2.c. Fill in the following table with other major events in the launch phase. Ensure that all audiences and all themes and messages of the campaign are adequately covered. *Timing* refers to approximately when the event would occur in relation to other events. The following codes are suggested:

- + *n* Days / Wks / Mths = how many days, etc. after the seminal event.
- After <*Index*> = the event is sequenced after the event indicated by *Index*.

Index	*Timing*	*Event*	*Messaging*	*Target Audiences*
0	---	*Seminal launch event as prepared in Step 1*		
1				
2				
3				
4				
5				
6				

2.d. Identify key barriers to mitigate so these events may proceed in the planned sequence and timeline.

★ 2.e. To make *Messaging* in step 2c above more efficient, identify an initial set of priority talking points and vignettes that members of the organization should use in the conduct of launch events (additional vignettes will emerge during launch implementation).

For the short form of this step, focus on the messages developed for 2a.

2.f. List pre-planned responses in the event of premature disclosure or the emergence of misinformation or disformation during the course of the launch. Consider the following four general strategies for ideas:

- *Categorical Denial* – refute the existence of the campaign.
- *Pre-Decisional Claims* – do not refute the campaign, but affirm that no decisions have been made.
- *Mitigation* – do not address the exposed information, redirect toward preferred messages.
- *Accommodation* – address the exposed information, affirming or denying it as appropriate.

3. Plan the Pre-Positioning of Messages:

This step in the Activity ensures that the right sets of talking points and vignettes gets to the right members while mitigating the potential for leaks or other premature disclosure, and being ready in case disclosure occurs. These need not be too detailed, but constitute broad guidance covering the whole launch phase that coordinators for each discrete event should use.

3.a. List members of the organization who have a critical need-to-know of the talking points and vignettes in step 2e. General classes of members is OK so long as each individual knows whether they are included or excluded.

3a (continued). List members who *need-to-know* for message prepositioning.

3.b. List external audiences who have a similar critical need-to-know prior to the launch phase. These are audiences who will be relied upon to deliver or reinforce messages on behalf of the organization.

3.c. Describe the plan for providing the talking points and vignettes to these actors. If needed, include protection measures aimed at preventing premature disclosure (e.g., encryption or other secured means of transmission, non-disclosure agreements, caveats or other control measures).

3.d. List audiences who *need-not-know* about the pending launch of the campaign. What would be the risks of them being prematurely aware of the campaign? What may be indicators that they have access to campaign information?

★ 3.e. List general guidance to participants in the launch phase, such as coordinating mechanisms to keep the organization informed of progress, gather feedback on each event, grow the lists of talking points and vignettes, and identify decision points related to generating new or cancelling events.

4. Identify Measures of Performance:

This step in the Activity addresses how the organization measures the performance of the launch phase. *Performance* is defined as the efficiency delivery of the message and its receipt and understanding (not necessarily acceptance) by the target audiences. For each question, provide the indicators (e.g., data, statements, audience reactions) and resources used to collect, analyze, and report them to organizational leaders. Note: *effectiveness* is the extent to which audiences change their behavior, is a longer-term measure and will be covered in Activity Eight.

4.a. Measures related to how well the organization 'said' and 'did' what it intended for each event?

★ 4.b. Measures related to the extent to which the target audiences *heard* the intended messages?

★ 4.c. Measures related to the extent to which the target audiences *understood* and *shared* the intended messages?

4.d. Measures indicating potential responses to the campaign by opponents of the organization, such as increases in activity or spreading of misinformation or disinformation?

5. Identify Conditions to Render Final 'Go' Decision:

If all steps of this Activity are completed and implemented, the campaign should be ready for launch. However, a *Go* decision can be made when the plan is incomplete but the risks are acceptable. Below, identify areas where an incomplete plan could still be implemented at acceptable risk to the campaign. What is the minimum needed for a satisfactory 'Go' decision?

Activity Eight: Develop the Post-Launch Sustainment Plan

Post-launch planning covers campaign sustainment in the long-term. Planning for post-launch is minimal and involves establishing the measures of effectiveness and its indicators so that the organization can detect what lasting effects the campaign is having on the environment. Planning during post-launch sets the 'battle rhythm' of the campaign after the initial attention to it has faded. How much effort will the organization put into the campaign during the first, second, third year and so on? How will the organization determine when the campaign should end?

The five steps in this Activity are: (1) establish measures of effectiveness, (2) routinize the campaign in the organization, (3) develop the assessment plan, (4) establish termination conditions, and (5) implementation post-launch sustainment. These steps should be initiated during pre-launch planning with the previous two Activities but it will not be possible to complete them in full detail. Rather, this is an emergent step in the campaign planning process, one that will evolve rapidly during launch and continue through the remainder of the campaign.

Before getting into the activities, this Step begins with an explanation of two dangers facing campaigns at post-launch – complacency and myopia. Both can result in the loss of member or stakeholder commitment and the resurgence of opposition to the organization. Post-launch is about keeping the campaign strong while keeping two dangers in check.

The first danger is complacency, which is the emerging lack of will to continue communicating the messages of the campaign. Leaders, members, stakeholders, or others determine that other communications have priority or have lost interest in further the campaign's messages. Sometimes, this is because the campaign is not doing 'well' and members prefer not to be associated with a failing effort. Complacency can both kill the campaign and undo any positive effects that came from it.

Myopia is the second danger where a lack of foresight and an inappropriately narrow view of the campaign can cause it to become isolated from the rest of the organization – falsely believing that the campaign is succeeded when it is instead being marginalized. The onset of myopia is often post-launch, when the organization reduces the energy it expends on the campaign and thus reduces its scope and intensity to make room for other priorities. This narrowing of scope can become a pattern as other activities impinge further into the campaign. Overcoming myopia involves a combination of leader and member self-awareness, a willingness to explore disconfirming data and challenge assumptions, and a suitable and acceptable injection of new messages into the campaign.

This Activity should be initiated at pre-launch and refined throughout campaign implementation to set conditions by which the organization avoids these two dangers and continues the campaign at appropriately high energy. The four steps in this Activity are: (1) establish measures of effectiveness, (2) routinize the campaign in the organization and its continuity plans, (3) develop the assessment plan, and (4) establish termination conditions.

Measures of Effectiveness

Effectiveness refers to the long-term implications of the campaign and how well it intervenes in the organization's standing campaign as intended. This is differentiated from performance in Activity Seven in that at the launch phase, the environment has only reacted to the launch events. The extent to which the relationships with the audiences has changed cannot be determined until later.

The purpose of this step is to define quantitatively or qualitatively what factors in the environment perceptible by the organization can provide evidence of progress toward vision achievement. From this, the organization places sensors in the environment to gather evidence and perform analysis. Although specific guidance on choosing sensors is beyond the scope of this book, these sensors can be human (internal or external to the organization) or automated depending on the data being

collected. Measures of effectiveness are aligned with the three desired outcomes of campaigns – (1) narrative promotion, (2) adversary isolation, and (3) counternarrative isolation. At pre-launch, it is probably only possible to describe the measures at a strategic level (see Figure 12[1]).

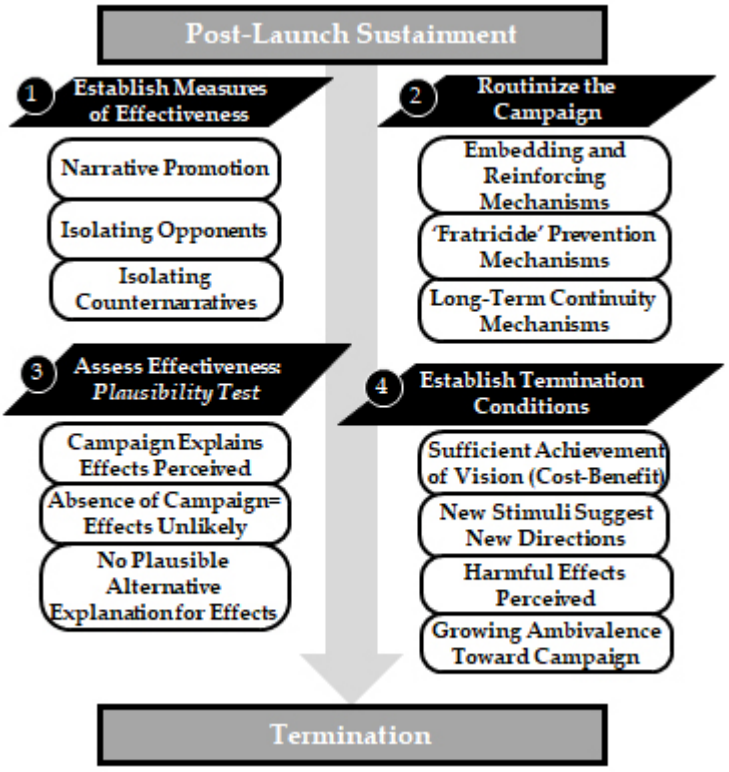

Figure 12. Post-Launch Sustainment Planning

Narrative Promotion

Named campaigns ultimately serve to promote the organization's *target narrative*, what the narrative should ultimately be as a result of the campaign. For steady-state campaigns, planners should look for indicators that the pre-existing narrative is adapted and reinforced by the campaign. In transformation campaigns, the organization's old narrative should be supplanted by the new, and measures should provide evidence that the transition to the new narrative is progressing toward becoming self-sustained. Guiding questions should be asked from any of three perspectives: (a) stakeholders, (b) organizational members, and then (c) of other audiences.

One is *to what extent are audiences aware of the target narrative?* Campaigns are successful if they sustain awareness among the target audiences. The campaign's launch phase may sell the narrative to audiences, but the post-launch phase focuses on keeping the target narrative active in the audience's mind. A failed campaign allows audience members to forget, lose interest, or reject the target narrative.

Another is *to what extent are the audiences willing to enact the target narrative?* This extends the awareness question to include desired behavior changes by other actors, especially friendly ones. Planners seek data to indicate that actors inside and outside the organization are demonstrating acceptance of the target narrative and distancing themselves as appropriate from the old narrative.

The next question relates to the inverse of the above. *To what extent is the audience openly rejecting the narrative?* While this may appear like an undesirable outcome, in fact it could reflect a positive audience response depending on the campaign. These measures segregate audience responses from passive apathy to overt reaction. If an audience is aware and takes no action or shows no interest, one might view the campaign as less successful than an audience that rebels against the message. Measures should distinguish whether the rejection is rational or emotional, and does the reaction serve to continue raising awareness or drive people away from the target narrative?

Then, there is the impact on the organization's reputation. One should hope that acceptance of the target narrative translates into a strong reputation, but if the narrative is rejected or poorly received, the image and reputation may suffer. Measures may be aligned with the following questions: (1) *Is the campaign contributing to the organization becoming better known? If so, in what ways?* and (2) *Is the campaign*

[1] Figure 12 is an original graphic by the author.

contributing to the organization becoming more favorably viewed?

The effects of the campaign on the membership may produce additional sources for measures of effectiveness. These include the extent to which the campaign strengthens member commitment to the organization or encourages them to withdraw or leave and emerging evidence of *change fatigue* indicating that internal support of the campaign is waning.

Isolating Opponents

Isolation of opponents is challenging to measure because many opponents will continue to communicate regardless. Instead one measures the influence that opponents sustain, especially over the organization's stakeholders. Below describe three broad levels of outcomes to consider when formulating these measures: (1) disruption, (2) marginalization, and (3) full isolation.

An opponent who is *disrupted* has greater difficulty expressing their messages because of lost credibility. Signs of a disrupted opponent include constant adjustments to the opposing message as though searching for the right words, steady elevation of rhetoric (e.g., increased emotion), or back-tracking or apologizing when their errors are exposed. Pressure on the opponents is causing them to be more cautious.

An opponent who is *marginalized* is one whose opportunities to communicate are restricted and whose impact is reduced. This can occur when the opponent's credibility is damaged, when their preferred forms of media are no longer accessible to them, or if their reputation with audiences worsens. Opponents are likely to adapt and seek new outlets to continue communicating, but those outlets have more limited and like-minded audiences, or the opponent attempts to fashion their own outlets.

An opponent who is *fully isolated* is one whose opportunities to communicate are severely restricted and who has little to no impact on the environment. In effect, they ultimately do stop communicating, probably to go silent and wait for an opportunity to return.

Isolating Counternarratives

Recall that counternarratives are never truly defeated. The actors may change or go away, but so long as the opposing message has been used, it can re-surface. Therefore, counternarrative isolation is not easy to measure. Planners must deduce whether emerging messages critical of the organization constitute new messages from an old counternarrative or a new one altogether. Consider the following two guiding questions as sources for measures of effectiveness.

First is *to what extent are the messages capturing attention?* By their nature, new messages are likely to spread just for being new. But, if the underlying counternarrative is an old one already isolated, one would expect signs that the new messages will lose traction quickly. But if they result from a new counternarrative, then audiences may be more interested and curious, causing the message to linger in the environment. The longer it lingers, of course, the more than the organization may have to do to counter it.

The second question is *to what extent do counternarratives influence friends and stakeholders?* New counternarratives may cause stakeholders to revisit old decisions or pursue new ones. Leaders must monitor whether new signals in the environment are influencing stakeholders in ways inimical to the campaign.

Routinizing the Campaign

Routinizing refers to how the campaign becomes self-sustaining and embedded in the organization's processes and culture. During post-launch, leaders ensure that members are granted the needed authorities, responsibilities, and duties to sustain the campaign over the long term. This should result in desired changes in the organization's communication practices.

This step has three parts. First is identifying *embedding and reinforcing mechanisms* for the campaign. Embedding mechanisms help anchor the campaign in the organization, helping it to communicate with the campaign in mind. Reinforcing mechanisms help sustain the campaign in institutional memory over time. While other competing activities may divert energy away, the reinforcing mechanisms should permit the restoration of such energy as desired.

The second part is *prevention of interference with other change efforts.* Put another way, how does the campaign prevent itself from negatively impacting other campaigns? How does prioritization and messaging across campaigns remain synchronized? What are red flags that the organization should look out for?

Finally, there is the *long-term continuity* plan. Turnover in military organizations means constant re-learning and re-training. How is information about the campaign transferred from outgoing personnel to incoming? Or what is the indoctrination plan for new personnel? What about special considerations for the leaders who will steward the narrative and govern the communication process?

Assessment & the "Plausibility" Test

Attributing the effects causally to the campaign is difficult. The natural complexity of the communication environment provides opportunities for many possible explanations for any long-term beneficial outcomes. In short, leaders must not overdetermine the campaign's success. If there is convincing evidence to show that a desired outcome was caused by something other than the campaign, leaders should acknowledge that fact.

While data collection on the campaign's effects is important and necessary, leaders cannot rely on deterministic or scientific approaches to verify the campaign's impact. Instead, leaders must rely on their judgment to determine to what extent the campaign influenced the environment favorable to the organization. The operative question follows: *is it plausible that the campaign brought about the perceived effects in the environment?*

This is called the *plausibility test,* and has three components: (1) does the presence of the campaign explain the effects perceived, (2) does the absence of the campaign means that the effects would likely not have been perceived, and (3) no other actor in the environment could have produced the effects?

The plausibility test approach seeks the *most likely explanation* for the effects rather than looking for scientific proof of causation. The important idea is to avoid claiming success on coincidence alone. There must be a demonstrable connection between the campaign and the effects that a reasonable disinterested party could empathize with even if they do not accept it. The lack of scientific proof means that not all audiences will accept the organization's judgment – and opponents are equally likely to either disagree with the effects perceived or argue against the effects being the result of the organization's action.

Termination Conditions

When does the campaign end? Or more importantly, how? Does it fade to black as its effects are realized but before the campaign's benefits no longer exceed its costs? Does it end abruptly, celebrated at sets off gloriously to the setting sun or cursed as is it cancelled? Is vision achievement really the end state or is it instead a new beginning to some further goal? At the pre-launch phase it is clearly not possible to run through all these scenarios. It is possible, however, to identify certain measures of effectiveness and conditions in the environment that may require a leader decision to terminate the campaign and suggest the best way to terminate it. Key is identifying indicators of conditions mandating a *Stop* decision – such as changes in the environment, clear evidence of the campaign failing in some way, or that the organization is unable to devote the needed resources or energy to its continuance.

Structure of the Activity

These four steps are followed in sequence. Like the previous two, these should be laid out together and filled in as ideas come in mind, as many of the answers to this Activity will be interdependent. Also, because pre-launch planning for campaign sustainment will be limited in detail, the focus should be on broad guidance that enables detailed sustainment planning later, when the opportunity arises.

Embedded in this Activity is the old military adage that *no plan survives first contact with the enemy*. Planners should prepare to update the information in this Activity as soon as the launch phase begins once the immediate reactions of the environment become apparent. However, they should also exercise caution that the immediate reactions will fade as launch proceeds. As tempting as it will be to continuously adjust the

campaign based on the results of each near-term activity, post-launch sustainment should be conducted with a long-term perspective. If the campaign is constantly being tweaked, it risks losing its strategic effectiveness.

Conduct of Activity Eight: Developing the Post-Launch Sustainment Plan

For the short form of this activity, complete items marked with a star (★) – steps 1 (reduced), 2a, 2e, and 4a-b.

★ 1. Establishing Measures of Effectiveness:

Define quantitatively or qualitatively what factors in the environment (hopefully perceptible by the organization) can provide evidence of progress toward achievement of the campaign's outcomes. Determine responsibilities for monitoring these factors, gathering evidence, and performing analysis – whether through human or automated means. During pre-launch planning, the measures themselves are sufficient – additional details may emerge as the campaign is implemented.

For the short form of this step, you will provide a total of 5 – two for 1a, two for 1b, and one for 1c.

★ 1.a. *Narrative Promotion*. List measures of effectiveness related to how well the new or adapted organization's narrative is impacting the environment. These may include

- Indicators that target audiences are aware of the target narrative, such that the target narrative is supplanting the old narrative
- Indicators that specific target audiences (*especially stakeholders*) are willing to enact the target narrative, meaning that they see the organization differently and behave or make decisions accordingly
- Indicators that target audiences may be rejecting the target narrative – preferring instead to use the old narrative (e.g., not acknowledging or ridiculing the target narrative)
- Indicators of change in the organization's reputation as a direct result of the campaign, for better or worse – that the organization is liked, respected, known for its services provided, etc.
- Indicators of change in internal member commitment to the organization as a direct result of the campaign, for better or worse – that members like being part of the organization more, are more loyal to it, or see the benefits of staying as increased

For the short form, two measures of effectiveness from among the above categories are sufficient.

★ 1.a. *Measures of effectiveness in narrative promotion (continued)*

★ 1.b. *Isolating Opponents.* List measures of effectiveness related to how well that the campaign is succeeding in influencing opposing parties and therefore protecting the target narrative

- Consider opponents who the campaign wishes to *disrupt* -- not inhibited from communicating but whose impact is reduced. Disrupted opponents have greater difficulty expressing their messages because of lost credibility through the campaign. List opponent and indicators of successful disruption.
- Consider opponents who the campaign wishes to *marginalize* – whose opportunities to communicate become limited and whose impact is severely reduced. Marginalized opponents experience damage to their credibility through the campaign. List opponent and indicators of successful marginalization
- Consider opponents who the campaign wishes to *fully isolate* – whose ability to communicate is virtually denied because of total loss of credibility and influence through the campaign. Possibility that the opponent ceases to exist or goes silent. List opponent and indicators of successful isolation.

For the short form, two measures of effectiveness from among the above categories are sufficient.

★ 1.b. *Measures of effectiveness in opponent isolation (continued)*

★ 1.c. *Isolating Counternarratives.* List measures of effectiveness related to how well that the campaign is succeeding in reducing the impact of counternarratives against the organization, particular their influence over the organization's stakeholders

For the short form, identifying one measure of effectiveness is sufficient

2. Routinize the Campaign in the Organization's Culture:

Routinizing refers to the appropriate incorporation of the campaign in the routine activities of the organization. Institutional practices—e.g., rules, norms, habits—experience lasting change. Potential areas of conflict or tension in the organization resulting from the campaign are ameliorated over time. The organization embeds the campaign and its effects into its on-boarding and continuity plans.

★ 2.a. Describe the longer-term changes in the organization's culture – its ways of 'getting things done' – as a result of the campaign. Include the following: possible changes in the internal structure, staff routines and processes, internal communication channels, and shared understandings

For the short form, 2-3 bullets will be sufficient

2.b. Identify *embedding mechanisms* to inculcate this culture change.

- What are ways that the organization can signal the need to change its behavior? These can take the form of formal rules, regulations, or other coercive actions; informal normative changes concerning habits or obligations that organizational members use to get things done; or shared understandings from which the organization interprets the environment.

2.c. Identify *reinforcing mechanisms* to sustain this culture change.

- What are ways that the organization can reinforce the change through incentives, sanctions, reminders, or other activities? These need not be one-to-one with the embedding mechanisms but the sum of the below should ensure a continued path toward the desired culture.

2.d. Identify other communication campaigns or major organizational activities that could conflict with this campaign (e.g., inconsistent or contradictory messages, competition for shared resources and organizational energy)

- Identify the campaigns or activities and characterize the potential conflicts
- What are the risks of allowing the conflict to go unresolved? Indicators or measures that those risks are being realized?
- What can be done to mitigate those risks? What leader messages would help?

★ 2.e. Describe a long-term continuity plan for the campaign. Among other things, this should reduce the impacts of personnel turnover and time lags in the campaign's conduct. These are over and above the reinforcing mechanisms given in step 2c above.

- Requirements regarding the transfer of responsibilities of the campaign to incoming members of the command group / top management team or officer-in-charge of the campaign's proponent
- Requirements for engaging transferring / incoming stakeholders
- Requirements for on-boarding new members into the organization

For the short form, 2-3 bullets will be sufficient

3. Establish the Parameters for Measuring Overall Success:

This step is aimed at allowing leaders to judge the overall attribution of *success* or *failure* to the campaign and help separate what the campaign contributed versus other factors in the environment. *This step is useful but not required at pre-launch*. However, it should be completed during the launch phase.

Determination of success or failure is done using the *plausibility test*. It seeks the most likely explanation for the effects rather than scientifically deriving an unequivocal deterministic cause. The important idea is to avoid claiming success on coincidence alone, there has to be a demonstrable connection between the campaign and the effects that a reasonable disinterested party could accept. The lack of scientific proof means that not all audiences will accept the organization's judgment – and opponents are equally likely to either disagree with the effects perceived or argue against the effects being the result of the organization's action.

The test has three components.

1. Does the presence of the campaign explain the effects perceived?
2. Does the absence of the campaign means that the effects would likely not have been perceived?
3. No other actor in the environment could have produced the effects?

Answer the questions as best as possible, recognizing that your answers will evolve as the campaign progresses.

3.a. How will one determine whether the measures of effectiveness in Step 1 of this Activity can plausibly be attributed to the campaign?

3.b. How will one determine that the absence of the campaign means that the measures of effectiveness in Step 1 of this Activity would not have been realized?

3.c. How will one determine that the measures of effectiveness in Step 1 of this Activity could not be explained by some other actor or condition in the environment? In other words, there is no plausible alternative explanation for the effects?

★ 4. Establish Termination Conditions for the Campaign:

When does the campaign end? Or more importantly, how? Does it fade to black as its effects are realized but before the campaign's benefits no longer exceed its costs? Does it end abruptly, celebrated at sets off gloriously to the setting sun or cursed as is it cancelled? Is vision achievement really the end state or is it instead a new beginning to some further goal? At the pre-launch phase it may not be possible to run through all these scenarios. It is possible, however, to identify certain measures of effectiveness and conditions in the environment that may require a *Stop* decision for the campaign.

Perform the steps below as thoroughly as possible, recognizing that the responses are likely to evolve as the campaign progresses.

★ 4.a. Describe possible *Stop* decision conditions using the measures of effectiveness in Step 1 of this Activity:

- Identify unsatisfactory results most likely indicating that the campaign is failing
- Identify thresholds where costs (e.g., monetary, reputation, energy, turnover) of conducting the campaign may become prohibitive compared to the benefits
- Identify thresholds where disinterest or apathy toward the campaign suggest that it was lost significant momentum, requiring excessive energy to restore it
- Some measures may natural show gains and losses over time (i.e., overall progress may appear as two-steps-forward, one-step back). Identify measures of effectiveness whose reversals of progress may signify major problems in the campaign.
- Similarly, identify conditions whereby measures of effectiveness may indicate diminishing returns for the campaign as presently designed and implemented.

For the short form, two such conditions among any of the above will suffice

★ 4.b. Identify any "kill switches," other conditions in the environment requiring an immediate *Stop* decision for the campaign

For the short form, one such condition is sufficient, or anwer N/A or "to be explored."

4.c. Articulate the *Stop* decision. If any of the conditions developed in Steps 4a or 4b are met and a *Stop* decision is needed, do the following:

- Identify the *Stop* conditions and why the decision is needed

- Identify the courses of action. The following options are offered as a guide:
    - *Continue the campaign as is or slightly adapted*
    - *Substantively modify the campaign* – present modifications to Activities Six through Eight
    - *Implement a new named campaign* aimed at pursuing the same or similar outcomes – perform Activities Five through Eight for the new campaign
    - *Terminate the present campaign outright* – present modifications to Activities Six through Eight aimed at negating recognition of the campaign but sustaining its outcomes
    - *Reverse the campaign* – develop a second campaign to undo all effects and restore the status quo ante. Perform Activites Five through Eight for the new campaign

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