THE LEARNING process

9. Communication at the service of our objectives
People who work in organizations, whatever the mission and purpose of our work, are constantly learning ... but sometimes we ask ourselves:

- How can we encourage the ownership of lessons learned by colleagues within the same organization or outside of it?
- Why would it be worth making the effort to convert an individual lesson learned into a group lesson learned?
- How can we ensure that the lesson learned is converted into knowledge?
- How can we contribute our individual lessons learned to the culture of institutional learning?
- Are the organizations learning at our pace?

An organization open to learning from its hits and misses is not only willing to improve its current work but also to reconsider its goals and strategies, and even reflect on the pertinence of its institutional mission and make the necessary adjustments. Through commitment to a culture of learning, organizations are also committing to strategies to maximize and scale the impacts of their work, ensure sustainability, inspire others and become weavers of communities of practice.
This material covers these questions and has been developed with the intention of supporting people or organizations interested in strengthening the culture of institutional learning. The “roadmap for a learning process focused on lessons learned”, which is the basis for the contents of this material, is the result of almost 10 years of work by the WWF US Forest and Climate team in conjunction with the teams from WWF Colombia, WWF Guyana, WWF Indonesia, WWF Peru and WWF Democratic Republic of Congo. The conceptual and methodological foundations, as well as the various tools provided for consideration, have mainly been developed within the framework of the project From REDD+ Agreements to REDD+ Results: Generating Results to Secure Consensus, a program supported by the Norwegian Agency for Development Cooperation and Norway’s International Climate and Forest Initiative.
The ideas and tools set out here are intended to be a source of inspiration and not a recipe to be followed to the letter. The complete series includes 10 animations and 10 PDFs, one for each video:

1. Conceptual and methodological foundations of the roadmap for the learning process.
2. General introduction to the toolbox for the four phases of the roadmap.
3. Tools for phase 1: Set-up and Framing.
4. Introduction to the tools for phase 2: Implementation of the methodology.
8. Tools for phase 4: Communicating and creating ownership of the results of the learning process.
9. Tool to design mini-communication strategies.
10. Lessons learned and reflections on institutional learning processes.
COMMUNICATION AT THE SERVICE OF OUR OBJECTIVES

In this document we will focus on the fundamental role that strategically managed communication can play in achieving our objectives, when achieving them depends on the decisions and actions of other people, institutions or organizations.
Many teams do not have a person dedicated to communication who can support technicians in this task. We have designed this tool so that people who are not experts can use communication effectively and strategically to achieve their objectives.

The purpose of the tool we share below is to aid the design of what we have called a “mini-communication strategy”.

Let's begin...
The design is based on a 7-step path and each step is directed by a guiding question.
1. IDENTIFY THE OBJECTIVE

First of all, we identify the objective: **What is the objective that requires communication support to achieve it?**

Not all of the objectives of our projects and processes need a communication strategy to achieve them. The strategy is applied when it is necessary to CONVINCE someone or give them an effective message so they act in a particular direction and help us achieve the objective.
1. The objective

Let’s learn from an example:

The objective that requires communication support to achieve it is that the Ministry of the Environment recognizes the value of focusing on sustainable productive landscapes to fulfil national commitments concerning forests and climate change and, consequently, provides technical and financial support to the Province of Palo Verde to develop that focus with livestock and agricultural farmers throughout provincial territory.

*: The example we use in this document is based on a true mini-comms strategy designed by WWF Peru in 2019.
2. IDENTIFY OUR AUDIENCE

The second step is to identify our audience: **who are the actors we must involve to achieve the selected objective?** In other words: **who do we need to convince?** Or, **who is the audience for the messages we need to convey?**

The audience may be a person, an organization or group of people. You must very precisely clarify what their role is in achieving the objective. For example, whether they take key decisions or whether they can do something that is very important to achieve the objective.
2. The audience

According to the example on Sustainable Productive Landscapes:

The actor we must involve as our audience to achieve the selected objective is the Ministry of the Environment, because it is the governing body for environmental matters. It is the focal point for climate change commitments and negotiations. It is the body that works with other sectors to meet the forests and climate change commitments. It can assign resources to implement sustainable productive landscapes at provincial level.
3. DEFINE THE CALL TO ACTION

In the third step, we define the call to action: what do we need the audience to do? The call to action is often made up of a series of steps that we need the audience to consecutively take in order to achieve the proposed objective.
3. The call to action

Let’s continue with the example. We need the Ministry of the Environment to take the following steps:

A first step we need is for the Minister to allow us to present the basic concept of Sustainable Productive Landscapes.

After the meeting, the Minister must take the third step: beginning technical discussions to support the inclusion of the Province of Palo Verde as a beneficiary of the special fund for innovative initiatives to stop deforestation.

After this step she must be convinced to move on to the next step: meeting with producers and the municipality of Palo Verde to talk about the importance of implementing the focus on sustainable productive landscapes as a contribution to achieving the national goals in the fight against deforestation.

The technical formulation must lead to the fourth and last step: the Ministry formalizes the administrative procedure that makes it possible to transfer financial resources and technical support to the municipal government of Palo Verde to develop the focus on Sustainable Productive Landscapes throughout provincial territory.
4. Detailed Characterization of the Audience

The fourth step in the design of the mini-communication strategy is to produce a detailed characterization of the audience: *What do we need to know about the audience in order to get them to do what we need them to do?*

In this step, we analyze several aspects that may aid or hinder our audience's movement along the path they have to go to help us achieve the objective:

What is their position in relation to the objective and their decision-making or action capacity? What could the barriers and motivations be for certain steps we need them to take and what knowledge do they have of what we want them to do?
4. Detailed characterization of the audience

Let's continue with the previous example. Within the Ministry of the Environment we should target the Minister, regarding her we have to specify several things.

She is familiar with the topic and aware of the work of the organization that has supported the municipal government of Palo Verde on developing the approach.

She has critical power to order that which results from the technical discussion and assign the funds.

She does not know about the approach taken in sustainable productive landscapes.

The government’s agenda concerning compliance with national goals related to deforestation and land use, and its commitment to working jointly with the main causes of deforestation to bring it to a halt.

Once we have identified the steps in the call to action, we come back to the audience and specify several things. Firstly, **who do we really need to reach** so they do what we want them to do? Identify specific people or groups within an organization.
5. DEFINE THE MESSAGES

In the fifth step, we define the messages. **What do we need the audience to know? What are the arguments that will convince them to do what we want them to do?** It is necessary to bear in mind that:

When you define the messages, it is very important to have a detailed characterization of the audience at the ready: everything we know about them helps us find the best-targeted messages; those that are based on their motivations and help overcome the barriers. (The messages must convey to the audience the benefits that will be obtained by achieving the objective.)

Messages play a key role in mobilizing the audience in the direction we need them to go.
Let’s continue learning from the example on Sustainable Productive Landscapes. The arguments that will convince the Minister to do what we want to be done:

**Message A**

Restoring degraded areas and conserving the remaining forests in agricultural areas ensures connectivity between large forest landscapes and contributes to meeting the national forest conservation goals.

**Message C**

The remaining forests on private and community land in the Province of Palo Verde have a high risk of deforestation, so their inclusion in the Ministry’s financial and technical support mechanism will become an incentive for conservation and restoration of the landscape, while encouraging the implementation of sustainable and forest-friendly productive activities.

**Message B**

The approach taken for Sustainable Productive Landscapes simultaneously enables conservation and production, an ideal strategy to support the ministry in meeting the national goals and the commitments on its agenda.

**Message D**

The province of Palo Verde has an exceptional geographical position for the interests of the Ministry of the Environment since it can act as a buffer on deforestation advancing from lowland areas and has the potential to ensure connectivity of the cross-border landscape and guarantee the altitudinal hydrological gradient.
6. DEFINE THE TACTICS

In the sixth step we define the tactics. *How can we reach the audience with the messages?*

Tactics are the set of materials, resources and channels that you must use to reach the audience with the messages in the manner and at the time they must arrive. It is possible that each message requires a different strategy, a different tactic, to help mobilize the audience in the direction we need them to go.

When defining tactics, it is very important to go back to the detailed characterization of the audience and take into account aspects such as the available time and the preference for a particular communication channel (for example, there are people who prefer to read, others who are more responsive to audiovisual formats).
6. Define the tactics

Let’s continue learning from the example on Sustainable Productive Landscapes by defining the materials, channels and means that we must use so the message reaches the Minister in the manner in which it should.

1. An informal approach by the non-governmental organization to the Minister to tell her about this process that has already started in Palo Verde.

Support material: A summary sheet and chart explaining the Sustainable Productive Landscapes strategy in the province and its importance in achieving the national goals for forest conservation.

Mean: Printed.

Channel: Informal meeting; asking her for a brief meeting, a maximum of 30 minutes, with the farmers and provincial government so they can tell her what they have been doing.

At the end of this informal meeting the Minister should have accepted the proposed short meeting.

2. A meeting lasting a maximum of 30 minutes with the farmers and the provincial mayor.

Participants: The Minister, Municipality of Palo Verde, farmers and accompanying NGO.

Support material: Presentation (maps, photos, many pictures, keywords). Short and visual materials, highlighting the multilevel and multisectoral work, and the benefits that this approach will bring to all parties if Palo Verde is finally supported by the technical and financial mechanism of the Ministry.

The product that will be left in the Minister’s hands at the end of the meeting: the concept of Sustainable Productive Landscapes and its potential contributions to the national goals (a maximum of 2 pages).

At the end of the meeting, the Minister must leave the door open to beginning technical meetings and assign a focal point for this.

3. In order to arrive at the commitment to begin the technical meetings, the farmers and the provincial government, with the support of the NGO, must follow it up through e-mails and telephone calls to arrange a date for the first technical meeting.

The messages must be reinforced with facts and data as the technical meetings progress, so that the last call to action is achieved: formal inclusion of Palo Verde in the Ministry’s financial and technical mechanism.
7. **DEFINE THE RESOURCES**

Once we have defined the tactics we are going to use to reach the audience with the messages, we arrive at the final step, which is to define the resources required to carry them out: *What do we need to put the strategy defined in the previous steps into practice? How much does it cost and where will the money come from?*

This step consolidates the information that will make it possible to carry out the communication strategy, including the responsibilities, times, costs and funding sources. We recommend producing this summary immediately after completing the exercise. Each of the participants should have a copy of the mini-strategy to monitor its implementation.

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### 7. The resources required

Let’s learn from an example:

The tasks are divided up, step by step, among the members of the team: the supporting NGO, the farmers, the provincial government.

Who will put the strategy defined in the previous step into practice? Who will produce the materials required in each step, how the contents will be refined, who is responsible for design? Who will talk at the various times? Who will perform the informal approach? Who will be the delegates in the meetings?

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How will the messages be delivered to the minister so that she can take the steps that we need her to take?

A budget must be drawn up that includes travel and production of materials, if necessary. The funding sources must be defined.

The dates for each step in the strategy must be agreed on.
The value of this tool lies in showing teams that using communication strategically need not be expensive or depend on having specialized communications personnel in the team. On many occasions, a well-prepared 10-minute meeting with clear messages and appropriate language can be very effective; a short PowerPoint presentation can be more productive than a costly publication. The mini-communication strategy brings these simple tactics to the fore.
In addition, when they carry out this exercise, most teams realize that:

The central point of communication is not producing materials but instead properly:

1. Identifying and clarifying the audience and knowing what is expected of them

2. Defining appropriate messages

3. Using the right channels

In short, what we are looking for is the application of strategic thought and the use of tactics to make that thought reality.
To continue with our learning process...

This document concludes the presentation of 4-phase roadmap of the learning process. We have gone a little further by proposing a straightforward communication strategy that can be very effective in achieving our objectives. In the next PDF, we will share thoughts and lessons learned, which we have built up along the way as we have applied the learning path; basically, what we have learned through the learning process.
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