

Marketing and Communications Strategy Framework

The resource has been adapted for the LGNSW Amalgamation Toolkit (2016) from content prepared for the Western Australian Metropolitan Implementation Committee.

GUIDE FOR PRACTITIONERS

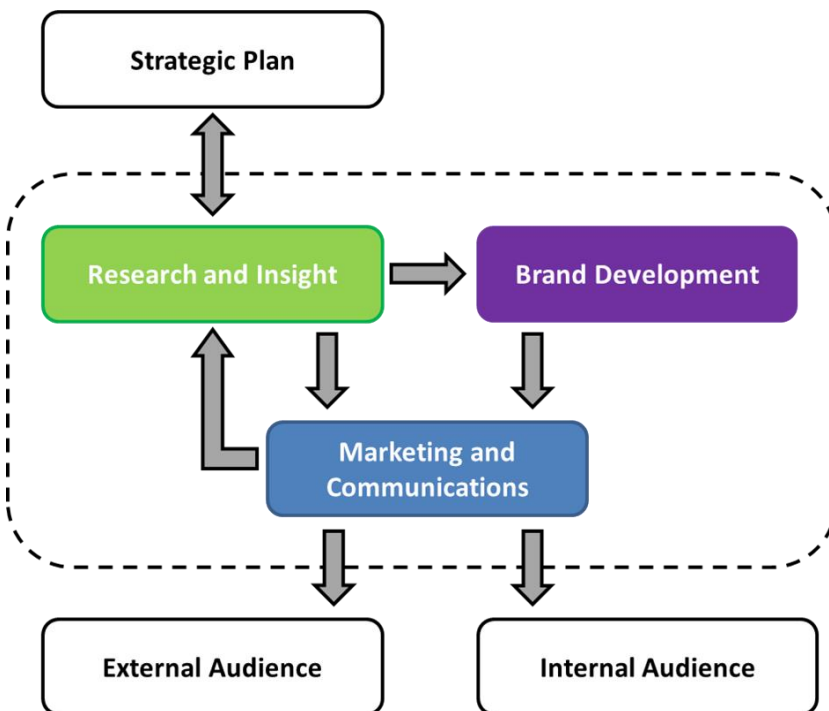
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Overview: Marketing and Communications Strategy

New councils created through amalgamations will need to address the expectations of diverse stakeholders that would be expected to include ratepayers, community groups, local business owners, other government agencies and media. A significant aspect of managing these expectations will be in communicating changes to aspects such as the name and contact details of the new entity to more complex process functions such as the impact of revised town planning schemes on individual building applications. As with the diversity in stakeholders required to be reached by the new entity, there are also a myriad of communication options ranging from traditional paid advertising, direct mail and town meetings to social media and online forums. To successfully coordinate the communication challenges confronting all newly created councils, it will be necessary for each to develop a formal Marketing and Communications Strategy.

The following document outlines the three key components of developing and implementing a Marketing and Communications Strategy, the broad steps required for each and a checklist specific to the requirements of a newly created council. As depicted below the three components - Research and Insight, Brand Development and Marketing and Communications - are proposed to communicate the organisation's objectives as defined in the Strategic Plan to the relevant external and internal stakeholder groups.



In the following, each of the three components of a Marketing and Communications Strategy will be examined to guide practitioners in the development of their strategies.

As presented the document is intended to be a guide for experienced practitioners and as such does not labour aspects that should be apparent to appropriately qualified professionals. It does, however, intend to serve as a reminder or guide as to the specifications that should be expected to be provided in a marketing and Communications Strategy in the context of a newly created local government entity.

Research and Insight Framework

The most critical first step in developing a Marketing and Communications Strategy is having an accurate understanding of what it is that needs to be communicated, to whom and how it can be most effective. This first component of Research and Insight can be overlooked in the enthusiasm to get the message out to the relevant stakeholders. However, without robust research, implementation decisions are effectively being based on guesswork and chance.

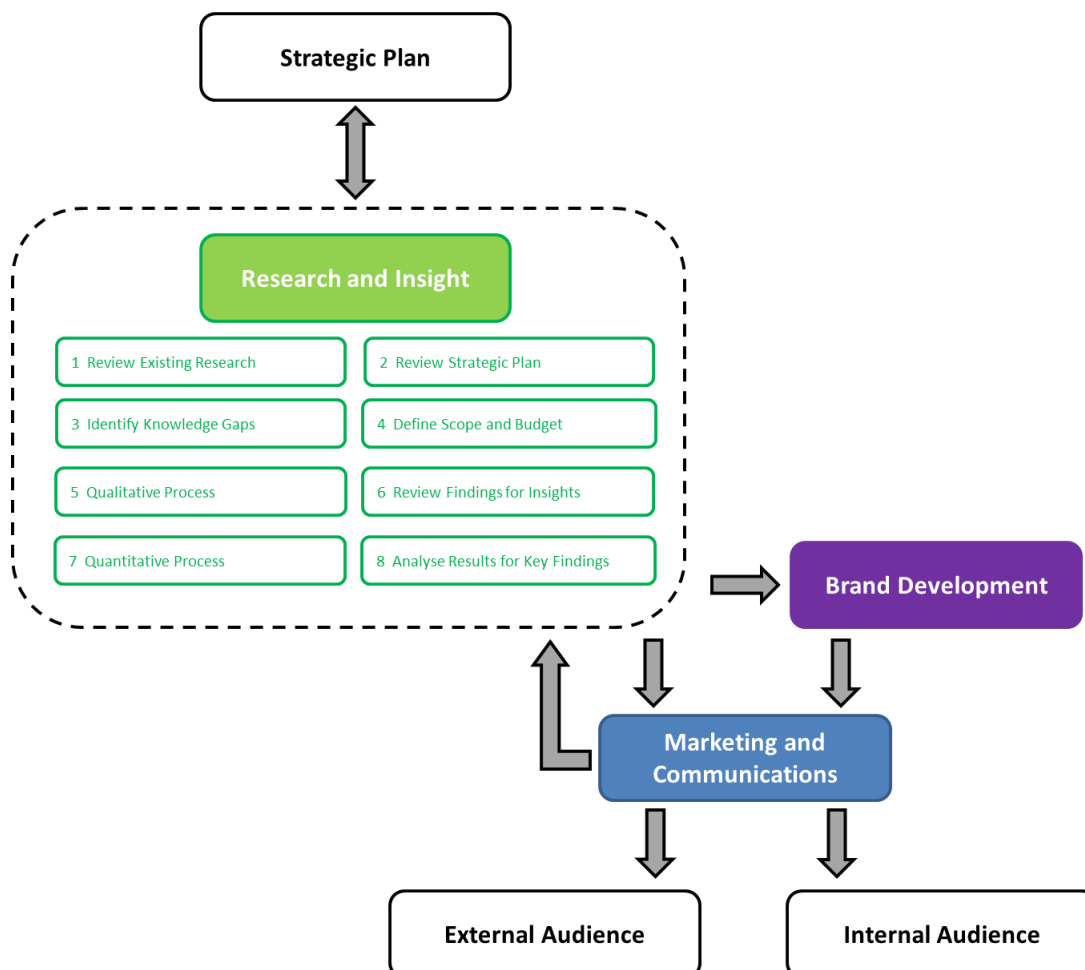
Consequently there are three key objectives in developing a research framework. These are:

Alignment with Strategic Plan: Research has relevance to organisation's core objectives.

Robust process with valid results: Professionally developed instruments and analysis.

Supported findings that are actionable: Insights translate to operational enhancements.

The figure below lists the steps in developing a Research and Insight component and illustrates the relationship to the organisation's Strategic Plan and the other components of Brand Development and the Marketing and Communications tactical plans.



The relationship between Research and Insight and the organisation's Strategic Plan is two-way and ongoing. Aligning the organisation's strategic objectives is a significant aspect in developing a research program as is feeding back the results and findings of the research into the refinement of the council's overall strategy.

The research program also has a two-way and ongoing relationship with the Marketing and Communications tactical plan. Just as Research and Insight provides the basis from which to develop and define the necessary communications, the review of the effectiveness of the selected tactics is critical in refining the research program. The insights of the research program, which include consideration of the organisation's strategic plan, directly contribute to the development of the brand for the new entity.

As mentioned from the outset, the Research and Insight program is critical to implementing an effective Marketing and Communications Strategy. However, it should not be presumed to be a one-off exercise but rather an ongoing process with annual reviews to monitor the combined impact of activity, identify changes in the environment and help ensure the organisation adapts and responds appropriately.

Research and Insight Development

The key steps in developing Research and Insight for the new council, as listed in the previous illustration, are briefly outlined as follows:

1. Review Existing Research

Just as it is problematic to start implementing communications tactics without adequate research insights, it is also inefficient to commence the research program without consideration of all previous surveys, questionnaires and research undertaken by the councils that came to form the new entity.

2. Consider Strategic Plan

Having reviewed any previous research, it is also critical to gain an understanding of the organisation's Strategic Plan and organisational objectives. Any communications plan that fails to address the key drivers of the organisation could not be expected to adequately contribute to the effectiveness of the new entity. An insight that should be gained from the Strategic Plan is the indication of key stakeholder groups and target audiences.

3. Identify Knowledge Gaps

Consideration of the previous research and organisation's Strategic Plan should highlight gaps in understanding of the new entity's communications requirements such as target audiences, effective channels and salient messages. Given the nature of the new entity being an amalgamation of previous separate councils, even comprehensive existing research should only be expected to have absolute relevance to part of the new audience.

4. Define Scope and Budget

At this point, the extent of the knowledge gaps and the scope of research program required should be apparent to a marketing professional. However, it is suggested the whole of the organisation (via the senior

executives) should be engaged to obtain input regarding perceived information gaps. Consideration should also be given to engaging research expertise to assist with the development of questionnaires, undertake survey field work and provide deeper statistical analysis. While such expertise adds to the project budget, it should also be expected to add veracity and insight. Any external research practitioners should be Qualified Practising Market Researcher (QPMR) accredited by the Australian Market and Social Research Society. These are listed at <http://www.amsrs.com.au/professional-standards/isoqpmr-accreditation-lists>

5. Conduct Qualitative Process

While not always undertaken and not always imperative when repeating a previously well supported survey, conducting a qualitative process can be of significantly greater value than its additional cost to the overall process.

The exploratory nature of qualitative research is anticipated to add efficiency as compared with discovery during the later processes. That is even a limited qualitative process should provide some insight that will help better focus the quantitative process to deliver the most critical information.

6. Review Findings for Insights

The qualitative process should provide significant direction as to the key issues, concerns and expectations of various stakeholders and their relationship and attitude towards the new entity. Again it is suggested that ideally a research professional would be engaged (from existing staff or externally) to assist with the factor analysis of the various themes presented in the sessions.

7. Conduct Quantitative Process

The aim of the quantitative process should be to deliver empirical data that can be analysed and tested against hypothesis. However, the usefulness of the data is dependent on the quality of the survey instruments developed from a sound qualitative base and applied to an adequate sample. For example, for a population of 100,000 people, a survey with results at a 95 per cent confidence level and a 5 per cent interval or error rate would require a random sample of 380 respondents. To this end it, engaging a QPMR accredited consultancy to assist is recommended.

8. Analyse Results for Key Findings

Without stringent analysis and testing of survey results, the data can be easily manipulated to support misleading findings. Often much interpretation of survey results does not advance past the raw percentage responses to questions which unfortunately limit the insights gained from the exercise. If terms such as cross tabulation, chi-squared test or regression analysis are foreign, it is strongly advised to engage a research professional to assist. The intention should be to identify insights that are actionable in that they translate to operational enhancements or beneficial changes.

Research and Insight Checklist

To undertake the research program for the new entity, a number of key objectives need to be achieved. A schedule of these, outlining necessary actions, the individuals with responsibility for delivery and the perceived resource requirements – both financial and human, internal and external - are outlined in the checklist below:

OBJECTIVE	ACTION	RESPONSIBILITY	RESOURCE REQUIREMENTS
Alignment with Strategic Plan	Consider Strategic Plan	Head of Marketing	Senior Executive
Robust process with valid results	Review existing research Identify knowledge gaps Define scope and budget Conduct qualitative process Review findings for insights Conduct quantitative process	Head of Marketing Research Consultant	Budget Allocation Research Consultant Senior Executive
Supported findings that are actionable	Identify knowledge gaps Analyse results for key findings	Head of Marketing	Research Consultant

Brand Development Framework

The next phase in developing a Marketing and Communications Strategy is having clear definition of the organisation's brand assets and the protocols and procedures around application of logos, palette and position statements. It is important to appreciate that the application of the brand and positioning will extend beyond the implementation activities of the Marketing and Communications Unit. Consequently, the process should engage and involve other business units for input on the limitations and requirements of practical implementation.

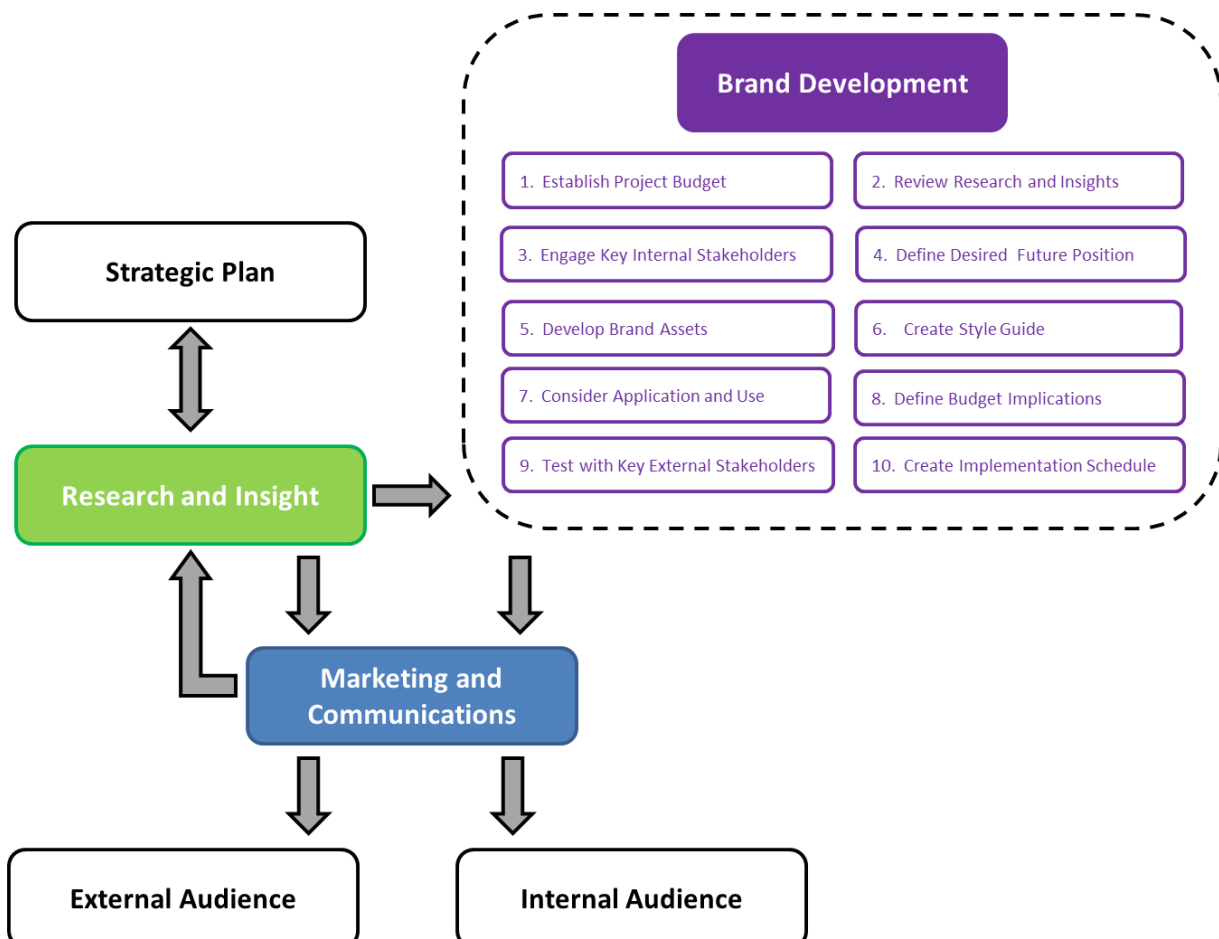
There are three key objectives that need to be realised in the Brand Development process for the new entity. These are:

Alignment on position for new entity: Brand supports how entity needs to be positioned.

Style guide outlining protocols and rules: Guidelines available for all business units.

Schedule for roll out of application: Timeline for implementation across organisation.

The figure below shows Brand Development driven from Research and Insight and contributing to the Marketing and Communications tactical plan, and lists the required steps.



Brand Development has a linear relationship with Research and Insight; and Marketing and Communications tactical plans. Research and Insight deliver critical information on key stakeholders' perceptions and aspirations for the new entity from which the brand can be developed to underpin the creation of Marketing and Communications tactics. The Brand Development process in itself does not measure performance of the brand as this is captured as part of the reviews embedded in the Marketing and Communications tactics and the ongoing Research and Insight program.

Brand Development

It is assumed for the purposes of this framework that the name of the new entity will have been established. Consequently, the key steps in Brand Development for the new council as listed in the previous illustration are now briefly outlined as follows:

1. Establish Project Budget

There is little value in commencing any part of the brand development process if the organisation does not have a sufficient budget. Consequently, the first step in the process should be to define the costs for the development of the brand assets and positioning and supporting style guide. It is likely that a creative agency will need to be engaged to assist with the project and consequently up to three providers should be requested to provide indicative costs. As part of this process there should also be an initial discussion with other business units as any application for a budget allocation should include an estimate of the cost of implementation across the organisation beyond those elements with responsibility of the Marketing and Communications unit. Examples may include signage, uniforms and general stationery.

2. Review Research and Insights

The Research and Insight program should be expected to provide a basis as to the expectations and aspirations of external stakeholders towards the organisation. Understanding how the organisation is currently perceived by key audiences is an important basis from which to develop the new entity's branding and positioning.

3. Engage Key Internal Stakeholders

In addition to understanding the final implications of new brand assets, it is also critical to engage representatives of internal stakeholder groups both for their input on their aspirations for the organisation and to help facilitate ongoing support and engagement across the new entity with the adopted positioning.

4. Define Desired Future Position

With an understanding of external perceptions and engagement from key internal stakeholders, the next step in the process is for the organisation to determine its desired future position – or how it would like to be perceived by key audiences. It may be that the external perceptions are aligned with the organisation's preferred position or there could be gaps that need to be addressed. With a new entity it is more likely that external stakeholders are yet to form strong opinions or beliefs which present an opportunity to more readily position the organisation.

This opportunity also comes with the risk that early initiatives and communications will have a far greater influence on the development of perceptions. It is recommended at this time to engage the most senior members of staff to ensure that the desired future positioning aligns with the aspirations and overall objectives of the organisation. There should be an appreciation that while brand identity and positioning will assist with creating a positive perception of the new entity, it will be less effective if it is not supported and reflected in the culture and practices of the organisation. This makes the involvement and engagement of the senior executive most critical.

5. Develop Brand Assets

Developing brand assets – logos, colour palates, tag lines – is simple to achieve but difficult to do well. It is a process that is both creative and grounded in specific insights and objectives. While it is likely there will be individuals in the organisation who believe they can undertake this process, and indeed may already have ideas, it is preferable to engage a creative agency to ensure the balance between creativity and strategy. The brand and positioning should be realised across the organisation – with touch points engaging all aspects of the organisation. For example, while it is often readily recognised that it will be apparent in signage, collateral and staff uniforms, branding should also be a demonstrative part of both the public facing and internal work areas with the brand identity complementary of the organisational culture and evident in interaction of staff with ratepayers and customers. The brand is the identity of the organisation and should be leveraged as such.

6. Create Style Guide

Implementation of the new branding and positioning will require finite rules and protocols. The creation of a Style Guide that is accessible across the organisation and addresses all applications of the brand assets should be created as soon as the elements of the branding and positioning are agreed. Again, the need for the brand position to be understood and supported across the organisation is key to its success in influencing external stakeholders.

7. Consider Application and Use

As mentioned previously, to be most effective, the new entity will have a need to apply the new branding and positioning across the organisation which will have implications beyond the Marketing and Communications Unit's functions. Examples outside of the normal scope of promotional tactics may include signage, uniforms and general stationery. An audit of the organisation should be undertaken to identify the extent to which the new branding will need to be applied to identify both scope of works and any unforeseen issues.

8. Define Budget Implications

In concert with defining the complete application of the brand assets and identifying any physical issues or problems, there will also be the need to establish the total cost of implementation across the organisation. While cost of implementation should not command the design of brand assets, it would be unrealistic not to be prepared to scale back components if confronted with excessive and avoidable implementation costs.

9. Test with Key External Stakeholders

Having reached agreement and engagement with key internal stakeholders on the brand and positioning and having satisfied that implementation is within budget parameters, it is recommended the attributes are tested with representatives of key external groups. This process should be as a final review to identify any unforeseen issues rather than to contribute major insight and consequently would be expected to involve three to four focus groups of up to eight individuals.

10. Create Implementation Schedule

The development of the branding and positioning has necessitated the engagement and contribution of senior executive from all parts of the organisation. It will now be necessary to again work across the whole of business to create a schedule for implementation. Ideally application would be simultaneous across the organisation. However, there may be physical or budgetary constraints that need consideration. Even without limitations or impediments to wholesale application there will need to be a detailed implementation schedule adopted to ensure that all aspects are captured. The schedule should include timelines and assign responsibility within each business unit.

Brand Development Checklist

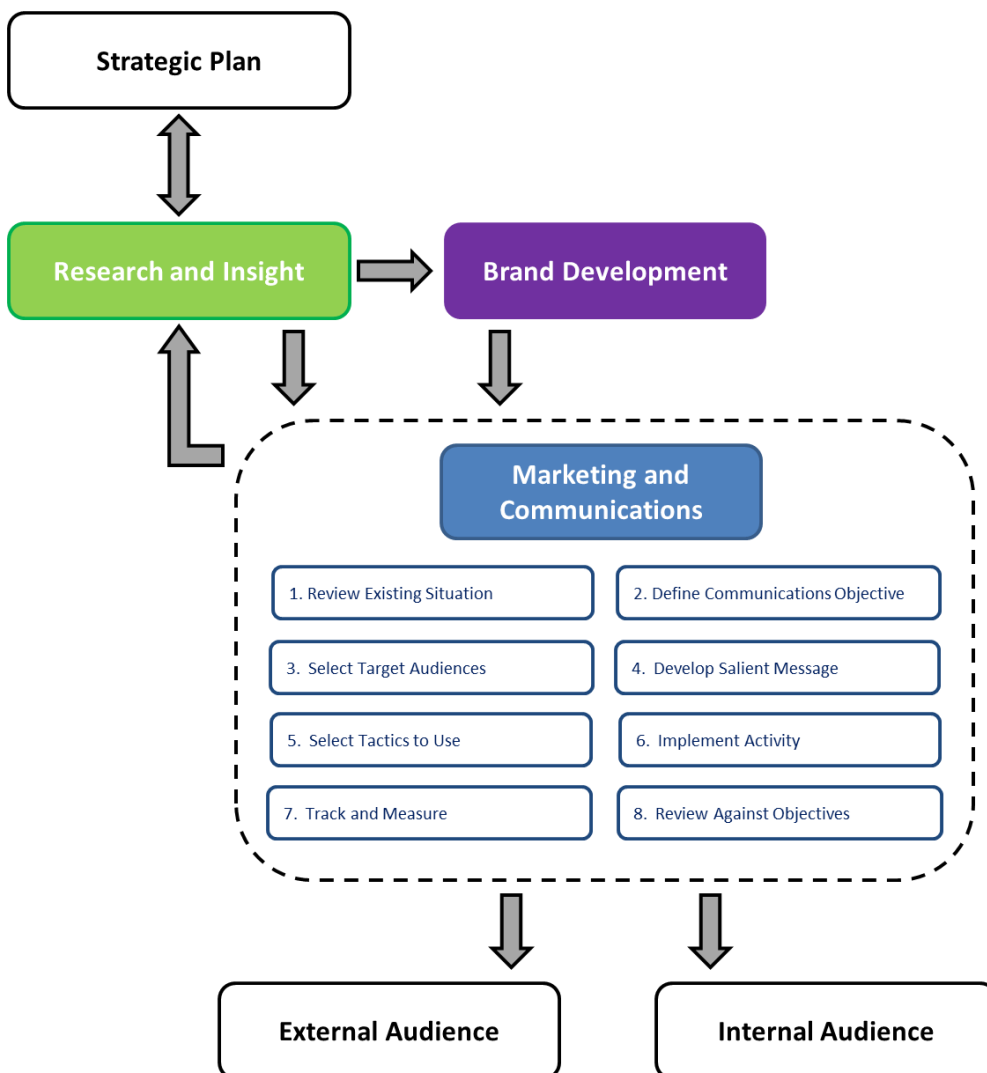
In completing the process of Brand Development for the new entity, there are three key objectives to achieve. A schedule of these, outlining necessary actions, the individuals with responsibility for delivery and the anticipated resources requirements are outlined in the checklist below:

OBJECTIVE	ACTION	RESPONSIBILITY	RESOURCE REQUIREMENTS
Alignment on position for new entity	Review Research and Insights Engage key internal stakeholders Define desired future position Test with key external stakeholders	Head of Marketing Senior Executive	Senior Executive
Style Guide outlining protocols and rules	Develop brand assets Create Style Guide	Head of Marketing Creative Agency	Budget Allocation Creative Agency
Schedule for roll out of application	Consider application and use Define budget implications Create implementation schedule	Head of Marketing Heads of Departments	Budget Allocation Senior Executive

Marketing and Communications Framework

Having established a sound research basis and developed the brand assets and positioning for the new entity, the organisation is then able to develop appropriate marketing and communications tactics to reach the various key stakeholder functions. For the purposes of the new entity there are five key plans to develop. These are: Internal Communications (staff and Elected Members); Community Communications (community, local business and other government); Media Relations (focus most likely to be local press); Social Media (specific digital tactics including web presence) and Events Management (primarily to define timing and reach).

The figure below shows the influence of both research and the brand on the development of Marketing and Communications tactics and the embedded review process that contributes to the ongoing refinement of the research program. It also outlines the steps in developing Marketing and Communications plans for each of the five key stakeholder functions.



In developing the Marketing and Communications tactics there are seven key objectives that include specific plans in the five functional areas. These seven objectives are:

Defined and supported strategic objectives: Tactics grounded in evidence and strategy.

All tactics align with the Style Guide: All tactics enhance the positioning of the organisation.

Internal communications plan: Target audience of staff and council's Elected Members.

Community communications plan: Target audience of community and local business.

Media relations plan: Focus likely local media (suburban/region) as most influential.

Social media plan: Select platforms on basis of audience and Council's capacity to deliver.

Events management plan: Schedule of timing, risks and contingencies within capacity.

Marketing and Communications Development

Of the seven objectives of the marketing and communications tactics, the first two – alignment with Strategic Objectives and the Style Guide - are requirements of implementation across all tactics in that they are grounded in the organisation's research and strategy and they align with the branding and position of the organisation. The next five objectives relate to the delivery of specific tactical plans for various marketing and communications functions.

If these five tactical plans are correctly developed and implemented, the two overarching objectives will be realised. To ensure the alignment of the plans for the five marketing and communications functions, the necessary steps are detailed briefly below. It is recognised that for two of the functions – Social Media and Events – the process will require some adaptation. This is addressed at the conclusion of the brief outline of the steps in:

1. Review Existing Situation

As a consequence of undertaking the research program and brand development, there should be clear insight into the communications gaps and imperatives for the new entity and the parameters of implementation. For each of the five functional plans – Internal, Community, Media, Social and Events – there should be identification of any pressing needs that must be addressed and the anticipated consequences of not proceeding.

2. Define Communications Objectives

From the review of the insights into the various stakeholder groups the required objectives of each functional plan should now be apparent. Objectives should not be verbose but as specific as possible as to what is intended to be achieved and ideally defined as a quantified target. Broad ranging objectives are difficult both to implement and measure for performance or achievement.

3. Select Target Audiences

Selection of the target audience is beyond the general stakeholder group at the core of the functional plan. Within every stakeholder group there will be a number of different target audience segments. These segments should have tactics developed as appropriate for each and implemented in a hierarchy as determined from the priority of the communications need. The question that needs to be answered is who specifically has to be reached to achieve the communications objective. These segments may be directly responsible for the required behaviour change or action or may have an influencing role but are more readily accessible.

4. Develop Salient Messages

The message that is intended to be communicated should be directly aligned to the overarching objective in consideration of the insights of the target audience and the specifics of the cohort.

It is not a campaign tag line or call to action but rather a brief summary of the elements – language, tone and proposition – most appropriate to the target audience.

5. Select Tactics to Use

Tactics should be selected in consideration of your target audience segment, the specifics of the cohort, and the elements of the salient message. The available budget will of course limit the extent to which the tactics can be implemented. However, budget should not be the first consideration in this process. The focus should be on the most effective way to reach the audience and it may be that an additional budget application is required. As with all aspects of the organisation, budget allocation will fall to priority of need. As part of selecting tactics, it will be necessary to nominate the measurement tool to be applied as most appropriate to the initial objective and target outcome.

6. Implement Activity

Implementation should provide a clear outline as to the timing and leverage of the various tactical choices. The recommended timing should again be in reference to the target audience segment and their known behaviours. If more than one tactic is intended to be deployed then timing and implementation should be coordinated to gain full leverage of the multi-media effect relationship between the tactical options.

7. Track and Measure

The selection of tracking and measuring the specific functional plan or campaign should be relevant and consistent. Most tactics have embedded measurements – such as the various analytics available for web site traffic – however, measurement tools can also be developed in direct relation to the intended behaviour of the target segment. The most effective measurement tools are those that can provide insights into specific elements of the campaign against achievement of the initial objective. As important in the selection of measurement tools is the consistent application and interpretation between periods. The important consideration is not the source of the tracking information but rather that it is done consistently, can be measured and fits with defining if the objective has been achieved.

8. Review Against Objectives

The importance of ensuring that the measurement tools applied are appropriate for the overall objective of the plan or campaign is to ensure that an objective assessment can be undertaken and insights gained to enhance effectiveness for future implementation. It is a step that can be overlooked in the absence of formal reporting requirements; however, it should be seen as an opportunity for constant improvement and adaptation and will be directly relevant to the next period's research program.

Adaptation for Social Media and Events Planning

In regard to Social Media Plans and Event Management Plans, the steps require some adaptation due to the specific tactical nature of these functions. Both Social Media and Events are communications tactics. As such, consideration of their application would be expected to be considered in reference to a stakeholder group. That is social media and events should normally be considered in the fifth step of Selecting Tactics along with press and electronic advertising, direct mail, collateral at facilities and other methods. However, for local government there are specific aspects of both Social Media and Events that require these to be specifically addressed separately rather than be part of the tactical consideration set.

Social Media Planning

In regard to Social Media there is the reality for councils that the organisation may be drawn into the tactic irrespective of their decision to participate or otherwise. As with any organisation that requires community consultation and input, councils should expect to be the subject of commentary on social media platforms. Consequently, the organisation first needs to decide whether it will participate in social media and, importantly, commit the necessary resources. A Social Media Plan is a plan already framed by the type of tactic (social media) and even though there are selections as to which platform is most appropriate (such as Twitter, Facebook, Instagram) the focus is more on the implementation and the ongoing resourcing (in particular internal requirements). Unlike tactics such as an advertising campaign, social media generally does not have a finite term and without sufficient ongoing resourcing, should not be commenced.

Events Planning

As with Social Media, Events Planning is addressed separately to other tactical options as a consequence of its specific context for local government. Rather than defining a target audience and selecting events as a specific tactic, many councils offer events as part of the community service function. Similar to the provision of libraries and recreation centres, events are often provided as a community service to the wider population (for example, festivals and concerts). As a result, the focus for Event Management is not so much as a tactic and the implementation is the most critical aspect of the planning steps. Unlike most other communications tactics, events management has more complex implementation requirements in coordinating logistics, risks and contingencies. In addition, supporting promotional tactics are likely to be required to position the Event in the community.

Marketing and Communications Checklist

The key deliverables of the Marketing and Communications tactics are those that will be most recognised as critical to those uninformed as to the required process. While the implementation of marketing and communications tactics are more demonstrative than other components of the process, it should be appreciated that these objectives are the later stages of a sequence that develops the complete strategy. Without the underpinning of research and application of brand assets, any marketing and communications tactics are likely to be unaligned and largely random, reactive activity with questionable long term influence. A checklist of the key objectives of the Marketing and Communications tactics is outlined below:

OBJECTIVE	ACTION	RESPONSIBILITY	RESOURCE REQUIREMENTS
Defined and supported strategic objectives	Review existing situation Define communications objectives Select tactics to use	Head of Marketing	Senior Executive
All tactics align with Style Guide	Review existing situation Define communications objectives Select tactics to use Implement activity	Head of Marketing Creative Agency	Budget Allocation
Create Plan for Internal Stakeholders Plan	Select target audiences Develop salient messages Select tactics to use Implement activity Track and measure Review against objectives	Head of Marketing Heads of Departments	Budget Allocation Creative Agency Senior Executive
Create External Stakeholders Plan	Select target audiences Develop salient messages Select tactics to use Implement activity Track and measure Review against objectives	Head of Marketing	Budget Allocation Senior Executive Creative Agency Media Buyers Research Consultant
Create Media Relations Plan	Select target audiences Develop salient messages Select tactics to use Implement activity Track and measure Review against objectives	Head of Marketing PR Officer	Budget Allocation Senior Executive
Create Social Media Plan	Select target audiences Develop salient messages Select tactics to use Implement activity Track and measure Review against objectives	Head of Marketing Digital Officer	Budget Allocation Media Buyers Specific Implementation Staff Head of IT Department
Create Events Management Plan	Select target audiences Select tactics to use Implement activity Track and measure Review against objectives	Head of Marketing Events Officer	Budget Allocation Operations Department

Checklist Summary

The following comprises a summary of the total of 14 key objectives as detailed for each component of the development of the Marketing and Communications Strategy. There is a chronology in actioning intended in the sequence in which the objectives are listed below. In most circumstances this chronology should be most appropriate. However, it is accepted that shifts in priorities could occur that may necessitate adaptation, particularly in the sequencing of various stakeholder groups. The 14 objectives in general sequence are as follows:

Research and Insight

OBJECTIVE	ACTION	RESPONSIBILITY	RESOURCE REQUIREMENTS
Alignment with Strategic Plan	Consider Strategic Plan	Head of Marketing	Senior Executive
Robust process with valid results	Review Existing Research Identify Knowledge Gaps Define Scope and Budget Conduct Qualitative Process Review Findings for Insights Conduct Quantitative Process	Head of Marketing Research Consultant	Budget Allocation Research Consultant Senior Executive
Supported findings that are actionable	Identify Knowledge Gaps Analyse Results for Key Findings	Head of Marketing	Research Consultant

Brand Development

OBJECTIVE	ACTION	RESPONSIBILITY	RESOURCE REQUIREMENTS
Alignment on position for new entity	Review Research and Insights Engage Key Internal Stakeholders Define Desired Future Position Test with Key External Stakeholders	Head of Marketing Senior Executive	Senior Executive
Style Guide outlining protocols and rules	Develop Brand Assets Create Style Guide	Head of Marketing Creative Agency	Budget Allocation Creative Agency
Schedule for roll out of application	Consider Application and Use Define Budget Implications Create Implementation Schedule	Head of Marketing Heads of Departments	Budget Allocation Senior Executive

Marketing and Communications

OBJECTIVE	ACTION	RESPONSIBILITY	RESOURCE REQUIREMENTS
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Create External Stakeholders Plan	Select target audiences Develop salient messages Select tactics to use Implement activity Track and measure Review against objectives	Head of Marketing	Budget Allocation Senior Executive Creative Agency Media Buyers Research Consultant
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Create Events Management Plan	Select target audiences Select tactics to use Implement activity Track and measure Review against objectives	Head of Marketing Events Officer	Budget Allocation Operations Department

As indicated from the outset, the complete Marketing and Communications Strategy document and checklist as presented is intended to be a guide for experienced practitioners. It serves as a reminder or guide to the specifications that should be expected to be provided in a Marketing and Communications Strategy in the context of a newly created local government entity.