

# Laying the Groundwork

## A 6-STEP COMMUNICATIONS AND ENGAGEMENT CHECKLIST

### 1. UPDATE INTERNAL STAKEHOLDERS ON THE NEED FOR A YOUNG ADULT ENGAGEMENT STRATEGY

- Visit [www.cooperative.com](http://www.cooperative.com) to familiarize yourself with the available tools and resources to engage young adults.
- Share Lexicon and young adult member research with your leadership team and with co-op staff through normal internal communications channels, such as a staff meeting, intranet posts, or an internal newsletter. Key takeaways can be found in the About Young Adult Members and Message sections of the Young Adult Member Engagement (YAME) toolkit on [cooperative.com](http://cooperative.com).

### 2. UPDATE YOUR COOPERATIVE STORY

- As appropriate for your co-op, update communication materials using Lexicon research and new cooperative story examples from the Message section of the YAME toolkit on [cooperative.com](http://cooperative.com).
- Update “About Us” page on website
- Update press release boilerplate language
- Update LinkedIn and other social media platforms
- Update printed materials, such as the billing statement and brochures

### 3. ANALYZE YOUR CO-OP’S YOUNG ADULT MEMBERS

- Review the segmentation and analysis information in the YAME toolkit. Learn what segmentation capabilities are available from your billing vendor. You may also want to consider segmentation expertise from NRECA’s market research team, Touchstone Energy’s research from the National Survey on the Cooperative Difference or companies that specialize in targeted communications and personas, such as Claritas.
- Download the Situational Analysis form to use as a guide for analyzing where your co-op stands today. Plan to update this information once per year to help inform your communication planning. It will be easier to prioritize your strategies and communicate to leadership what resources are needed for engaging young adults once you know this information. Gaps in the assessment may represent opportunities to ask for additional resources. A full cooperative strategy with related tools and resources is available from Touchstone Energy in its Strategy Execution System section.

#### 4. WRITE YOUR COMMUNICATION PLAN

- Review the young adult member research, recommendations and sample communication plans, as well as your co-op's strategic plan and young adult member data, to develop your co-op's plan for engaging young adults. Consider your available staff and monetary resources when scaling your plan to ensure it is achievable.
- As you plan new strategies for reaching and engaging younger members, start by reviewing what you are already doing. You may only need small adjustments to tweak your existing program or activity to fit the needs of a younger audience.
- Scan the Idea Bank and Idea Starters document in the YAME toolkit and Touchstone Energy reports in its Best Practices Knowledgebase Library to gather new ideas to include in your plan.
- Determine the resources and budget necessary to execute your strategies.
- Identify training needs. Changes to your co-op story not only impact the written word but how we speak with members. Member services representatives and directors are two groups that may need additional message training due to their roles. Touchstone Energy Cooperative members can use the Road to Member Engagement and Service Excellence training to jumpstart your effort.
- Refine your plan with your CEO, other leadership and key stakeholders. Present the final plan to staff and directors.

#### 5. EXECUTE YOUR COMMUNICATION PLAN

- Visit the Engagement Resources tab of the YAME toolkit, as well as the page on the Lexicon Project, for content and messaging that resonates with the young adult market.
- Review the sample communication plans and calendars in the young adult toolkit for assistance and ideas on how to turn your strategies and content plans into a visual planning tool for the year.
- If you need guidance on a multi-channel approach, or on one specific channel, reference the Reaching Young Adult Members section of the toolkit.
- Check out the Content Boosts provided by NRECA and Touchstone Energy throughout the YAME toolkit to provide you with a headstart in your communication efforts.

#### 6. FEEDBACK AND MEASUREMENT

- Open up the dialogue. Stay close to your members by asking for continuous feedback. Guidance on everything from informal polling through Instagram to professional surveying is available in the Member Feedback and Survey Tools tab in the toolkit.
- Create a measurement plan tied to your specific communication plan goals and the related metrics. Use the results to inform changes to next year's plan and resources requests to leadership.

