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Using Messaging and Communication to Influence and Inform: Insights From the Private Sector

*A Virtual Think Tank (ViTTa®)
Report*



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What Is ViTTa®?

NSI's Virtual Think Tank (ViTTa®) provides rapid response to critical information needs by pulsing a global network of subject matter experts (SMEs) to generate a wide range of expert insights. For the Strategic Multilayer Assessment (SMA) Integrating Information into Joint Operations (IIJO) project, ViTTa® was used to address a number of key questions provided by the project's sponsors. ViTTa® reports are designed to provide highly customizable and compelling analyses, summaries, and briefings that consider varied perspectives across disciplines, challenge assumptions, provide actionable insights, and highlight areas of convergence and divergence.

Question of Focus

What are relevant insights from the private sector with respect to using messaging and communication to influence and inform different audiences?

Subject Matter Expert Contributors

Paul Astorino (Senior Vice President, Global Merchandizing, Clarks), **Catherine Chapman** (Founder and CEO, Parenthetic), **Cyndi Coon** (CEO and Founder, Labratory5 Inc.), **John DeBello** (President and Chief Creative Officer, Loma Media), **Bill Heater** (Creative Executive, Real Life Creative), **Dr. William McEwen** (Advertising Executive and Consultant, Independent), **Dr. Jay Rosen** (Author and Associate Professor of Journalism, NYU), **Shari Rosenfeld** (Senior Vice President of International Social Impact, Sesame Workshop), **Dr. Don Stacks** (Professor Emeritus, Public Relations, School of Communication, University of Miami; CEO, International Public Relations Research Conference), **Al Teller** (Music Industry Executive, Independent), **Sherrie Westin** (President, Sesame Workshop), **Two Anonymous Gaming Industry Executives**.



Using Messaging and Communication to Influence and Inform: Insights From the Private Sector

This ViTTa® summary report reflects on the insightful commentary from interviews with thirteen messaging and communications experts from the private sector. The backgrounds of the expert contributors interviewed as part of this ViTTa® elicitation include advertising, branding, marketing, public relations, storytelling, and journalism. For this ViTTa® report, the expert contributors offer insights from their experiences in using messaging and communication in the private sector to influence and inform different audiences. This summary presents an overview of the key expert contributor insights heard over the course of interviews with the experts.

Best Practices for Effective Messaging and Communication (i.e., the Art of Effective Storytelling)

The contributors offer several best practices for effective messaging and communication. The most commonly cited best practices from the overall contributor response include:

- Doing research to ensure that messengers know and understand their target audience, develop a well-crafted messaging plan, and set clear and measurable objectives for their messaging efforts.
- Tailoring and localizing messages and messengers to the targeted audience.
- Ensuring credibility, coherence, and consistency of both the message and messenger.
- Making emotional connections with those receiving the message.

Do Your Research: Know Your Audience, Have a Plan, and Set Clear Objectives

Know Your Audience. The most frequently cited best practice for effective messaging and communication is doing research to understand the audience being targeted by the message or communication (i.e., know your audience). The contributors universally emphasize the importance for those doing the messaging to know and understand the audience with which they are interested in communicating. Doing research to develop such knowledge and understanding of a targeted audience at the onset of any messaging effort is, according to the contributors, a key driver of whether that effort will ultimately be effective (Astorino, Chapman, Coon, DeBello, Heater, McEwen, Stacks, Westin & Rosenfeld).

Communication efforts should begin with an understanding of the target audience and what they think and how they think.

—John DeBello (Loma Media)

The contributors generally echo the assessment of John DeBello, of Loma Media, that “all communication efforts should begin with an understanding of the target audience and what they think and how they think.” Knowing the audience entails understanding what motivates them, who the stakeholders are, and what types of information and messaging various segments of that audience empathize with and advocate for (Astorino, DeBello, Heater, Stacks, Westin & Rosenfeld). Once such understanding and knowledge of a targeted audience is developed, those doing the messaging can then use that information to tailor the messages and information being conveyed to more directly appeal to that audience. Messages that are tailored and targeted, the contributors stress, are more likely to resonate with the audience, and can be designed and presented in a way that is more likely to trigger attitudinal or behavioral change among targeted stakeholders within that audience (Chapman, DeBello, McEwen, Stacks, Westin & Rosenfeld). Ultimately, as advertising executive Dr. William McEwen aptly concludes, effective communicators typically have a very good understanding of who their target audience is, and it cannot and should not be everyone.

Have a Plan and Clear Objectives. The contributors also emphasize the importance of developing a communication plan and fully understanding and outlining the objectives of the communication effort. This entails understanding what the communication is intended to do (i.e., inform, persuade, entertain, etc.); what communication channels are available and applicable; where the audience stands in relation to the communication being sent, both in terms of overall awareness and level of support; and how the impact and effect of the communication can be evaluated (Chapman, Coon, DeBello, Heater, McEwen, Stacks). Ultimately, as the contributors stress, effective communication efforts typically begin with a clear understanding of what the communication process will look like and what the objectives are, in addition to understanding who the targeted audience is.

The contributors offer several recommendations for shaping and designing processes and objectives of messaging and communication efforts. McEwen emphasizes the importance of pursuing objectives that are achievable, offering that communication processes should consist of intermediate steps that are clearly defined and work toward an ultimate longer-term goal. Catherine Chapman, of Parenthetic, similarly emphasizes the importance of having a clearly defined communication process, pointing to John Boyd's OODA (observe, orient, decide, act) Loop as a useful framework for thinking about and designing effective communication processes. Chapman offers a slightly tailored version of the OODA loop that, she suggests, more closely aligns with the communication space: One that consists of planning, development, execution, measurement, and optimization phases. Such a process, Chapman stresses, should ultimately begin by doing research to ensure that an appropriate and effective message will be sent, through an appropriate and effective messenger and messaging channel, at an appropriate and effective time, to achieve an intended effect. Cyndi Coon, of Labratory5 Inc., suggests that messaging and communication efforts should be designed to "show" rather than "tell," arguing that "information sharing is storytelling. You cannot tell people. You must show them." Coon contends that communicators should strive not to simply *tell* an audience to do something, which she suggests is more likely to trigger pushback and negative reaction, but instead to use trusted and influential messengers to *demonstrate* the message being sent, which she suggests is more likely to resonate with and encourage buy-in from the audience. Finally, DeBello asserts that "it is not what I say, it is what you hear," highlighting that there are differences in how various audiences will approach and interpret the same message. Thus, as DeBello concludes, the specific targeted audience of a communication should always be kept in mind when designing and tailoring communication processes and objectives.

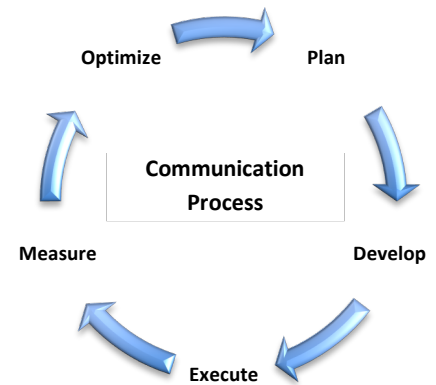


Figure 1: Chapman's proposed process for effective communication

Tailor Your Message to Your Audience

The contributors generally agree that the most effective messages and communications are typically those that are tailored to a targeted audience. Tailored and localized messages that a targeted audience can relate to and see themselves in are often more likely to resonate with and have an impact on those

receiving the messages than are those messages that are largely generic or nonspecific (Astorino, Coon, Heater, Stacks, Westin & Rosenfeld, Anonymous Gaming Industry Executives). Not only should the message itself be tailored and localized to the targeted audience, but those communicating the message and the channels used for communication should also be similarly tailored and localized to effectively reach and impact the intended audience (Astorino, Coon, Westin & Rosenfeld).

Accordingly, those behind the crafting, design, and implementation of messaging efforts must also be aware of cultural sensitivities among intended audiences (Coon, Westin & Rosenfeld). In this vein, Coon emphasizes the importance of being diligent about using local and cultural representatives to convey the message, if appropriate to the specific message being sent. Doing so, Coon explains, helps ensure that the messages being sent will be relatable and, thus, more likely to resonate with the targeted audience. Sherrie Westin and Shari Rosenfeld, of Sesame Workshop, similarly stress the need for localized messaging and cultural sensitivity, highlighting the importance of listening to and learning from the communities in which messages are being targeted, reflecting the culture of the audience in the messages being sent, and, when possible, using local spokespeople and influencers to convey the messages rather than dictating those messages from an outside voice. As Westin and Rosenfeld explain, the reception to a message is typically enhanced when the audience can connect and personally relate to what is being said and who is saying it. Ultimately, audiences are most receptive to messages and messengers with whom they are familiar and can identify and connect directly with. Thus, the most effective messaging and communication efforts are typically those that are tailored and localized to trigger such reactions.

The Three Cs: Credibility, Coherence, and Consistency



Figure 2: The three Cs of effective messaging

Another frequently cited best practice for effective messaging and communication is establishing and promoting credibility, coherence, and consistency, both of the message and messenger.

Credibility (Your Brand Matters). The contributors emphasize the importance and central role of credibility in effective messaging and communication, both in relation to the message being sent and those sending the message. If the goal is to use messaging and communication to influence an audience, the messenger's "brand" matters. Messages and messengers are more likely to be accepted by a targeted audience if they are deemed credible (Chapman, DeBello, Heater, McEwen, Stacks, Westin & Rosenfeld). Moreover, credible messages and messengers are more likely to be perceived as authentic and trustworthy among the target audience. Like

credibility, perceived authenticity and trust of a message and messenger are factors that are frequently cited by contributors as being conducive to effective communication (Astorino, Coon, DeBello, Heater, McEwen, Stacks, Anonymous Gaming Industry Executives). Credibility is also especially important in a time when so many competing messages, messengers, and messaging channels are available to audiences. Those deemed credible are more likely to stand out and resonate, whereas those lacking credibility are increasingly likely to be overlooked or ignored (Chapman). Credibility, however, is not a given, nor something that is always easy to achieve among audiences in which it has not already been

established (Heater, McEwen, Stacks). Here again, tailored and localized messages and messengers can go a long way toward building the credibility, authenticity, and trustworthiness surrounding a communication effort (Astorino, Chapman, Coon, Heater, Westin & Rosenfeld).

Coherence (Keep it Simple and Clear, and Tell a Story). The most effective messages are typically those that are coherent and easy to understand (DeBello, Heater, McEwen, Rosen). Messengers sometimes overcomplicate their messages and communications, or try to say too much all at once. Doing so, the contributors stress, is often a mistake and something that should be avoided. A better practice for effective communication is to focus on message coherence and keeping the message simple, straightforward, clear, and easily digestible (Heater, McEwen, Rosen, Anonymous Gaming Industry Executives). Several contributors suggest that telling a story through the messaging being conveyed is also conducive to effective communication. These contributors generally agree that communicating through stories is typically an effective way to convey messages that are likely to resonate and stick with targeted audiences (Astorino, Coon, Heater, Westin & Rosenfeld, Anonymous Gaming Industry Executives).

Consistency (Stay on Message, and Repeat, Repeat, Repeat). Consistency in messaging is also frequently cited by contributors as a best practice for effective communication. The contributors generally agree that message consistency and staying on message is a key driver of message retention among audiences (Astorino, Heater, McEwen). Similarly, message repetition is also frequently cited by contributors as a key driver of message retention. In short, repeating the same message over and over to an audience increases the likelihood of that message sticking and resonating with that audience (Astorino, Heater, McEwen, Rosen).

Make Emotional Connections

Messages and messengers that trigger emotions or build emotional connections with a targeted audience are likely to resonate, impact, and spark attitudinal or behavioral change among those receiving the message (Astorino, Rosen, Westin & Rosenfeld, Anonymous Gaming Industry Executives). Emotional connections can come in many forms and can be triggered in many ways, but contributors point to a few emotions as particularly effective in making messages impact and resonate with audiences. Several contributors highlight empathy and feelings of relatability as emotions that, if triggered through messaging, can make the message resonate and stick in the minds of the audience (Westin & Rosenfeld, Anonymous Gaming Industry Executives). Westin and Rosenfeld point to humor as a particularly effective emotion when messaging, though they note that humor is not universal, especially across cultures, and must be tailored and localized to a targeted audience to be effective. Finally, Dr. Jay Rosen of NYU points to fear and sensationalism as emotions that are particularly effective for making messages resonate and stand out, especially in news media where attention appears to increasingly focus on stories that trigger such emotions. Rosen offers an important caveat, however, noting that while using messaging and communication to trigger fear and sensationalism among an

audience can be effective in getting an audience’s attention and making a message resonate with the audience, it is not necessarily a responsible or best practice.¹

Best Practices for Countering False, Harmful Information and Competing Messages and Communications

Communicators frequently face the challenge of having to counter false, harmful information and competing messages. Such information can come in many forms, including misinformation, disinformation, and mal-information,² and from many sources, including direct competitors or other non-competitive entities. The contributors offer several best practices for countering these misleading types of messages and information. Overall, these best practices generally align closely with best practices for effective messaging and communication more generally, as outlined above. However, several are highlighted by the contributors as of particular relevance to effectively countering false, harmful information and competing messages in particular, including:

- Identify the false, harmful information and competing messages, its audience, and the channels through which it is spread, and develop a plan to counter it.
- Respond quickly and aggressively to directly confront false, harmful information.
- Be careful not to overamplify false, harmful information and competing messages.

Recognize False, Harmful Information and Develop a Plan to Counter

The first step to countering false and harmful information is recognizing its existence and understanding where it is coming from, who is spreading it, through what channels it is being distributed, and how it is resonating with and impacting different audiences (Coon, DeBello, Rosen, Westin & Rosenfeld). Understanding all of this can pose a significant challenge, however, and the rapid evolution of messaging tools and communication tactics has made tracking, understanding, and thwarting false, harmful information and competing messages all the more complex. To effectively combat and counter such information and messaging, communicators must simultaneously develop and implement an effective counter-communication strategy while also working to safeguard the communicator’s “brand” against any damaging information (DeBello, Teller). Essentially, as DeBello explains, for communicators to be truly effective in this space of counter-communication, they must be able to message both offensively and defensively as needed.

¹ Rosen notes that this is especially true in journalism where, as he explains, the objective should be to inform the public rather than engaging or influencing their emotions.

² Most of the contributors use misinformation as an umbrella term for both false and harmful information. For the purposes of this report, these terms are defined as follows. **Misinformation** is the sharing of false information, but without the intent to harm. **Disinformation** is the purposeful sharing of false information with the intention of manipulating an audience. **Mal-information** is the release of accurate information with the intent to harm (Coon).

Respond Quickly and Aggressively

Contributors underscore the importance of responding quickly and aggressively to directly confront and counter false, harmful information (DeBello, Stacks, Teller). If the goal is to effectively counter false, harmful information and competing messages that are being directed toward an audience from a competing messenger, communicators should respond quickly. A false narrative has less time to linger, resonate, and spread if an effective counter-narrative is quickly made available to the audience. Similarly, communicators should respond aggressively, directly calling out and countering false, harmful information and messages (DeBello, Heater, Stacks, Teller). By aggressively and directly attacking false, harmful information, communicators can re-focus the audience's attention on more preferable information and messages, while simultaneously attacking the credibility of the competing messenger (DeBello, Heater). The sheer number of messages sent as part of a counter-messaging effort can also be a contributing factor to its success—sending more messages than a competitor can help with both share of voice and target audience message retention (Coon, DeBello, Heater, Rosen, Stacks).

Be Careful Not to Overamplify False, Harmful Information or Competing Messages

While the contributors highlight the importance of responding quickly and aggressively to counter false, harmful information and competing messages, they also stress the importance of doing so in a way that does not overamplify damaging information and messages (DeBello, Rosen, Stacks). Rosen underscores this point, noting that messengers have to be careful when calling out disinformation directly to protect the audience from being further indoctrinated by such information. Ultimately, the expert contributors highlight a delicate and important balance that must be struck in messaging to counter false, harmful information: Messengers should respond rapidly and aggressively to quickly counter the disinformation, but must also be careful to communicate in a way that does not overamplify the inaccurate and harmful information among the audience.

Best Practices for Evaluating Messaging and Communication Effectiveness

Determining the effectiveness of messaging and communication efforts can be challenging. While there does not appear to be a universal, one-size-fits-all approach to evaluating and measuring the effectiveness of messaging and communications, the contributors do offer several basic principles and best practices for such evaluation, including:

- Set clear and measurable objectives.
- Measure both the reach and impact of messages and communications.
- Evaluate and understand trends, both consistent and emerging, relating to the audience's sentiment and perceptions.

Set Clear and Measurable Objectives

As discussed above, to fully evaluate the effectiveness of a message, a communicator first needs to define what the objective of the message is, what effectiveness means in relation to the message, and how progress toward the objective can be measured (Chapman, Heater, McEwen, Stacks). What it means to be “effective” will vary depending on these factors, as well as the nature of the message. For example, in commercial marketing, sales data can offer useful insight into a marketing campaign’s effectiveness (McEwen). For journalists, metrics such as online views and the number and location of a story’s publications can help indicate that story’s effectiveness and reach (Rosen). For storytellers, audience ratings and viewership metrics can offer a window into the extent of a message’s spread (Westin & Rosenfeld, Anonymous Gaming Industry Executives). Ultimately, communicators should strive to establish clear and measurable objectives at the onset of a communication effort, and should then work to develop evaluation and effectiveness measurements and metrics that relate to those established objectives (Chapman, Heater, McEwen, Stacks).

Measure Both the Reach and Impact of the Message

The overall number of exposures a message receives and its lasting impact on the audience are two strong indicators of messaging performance and effectiveness. Evaluating a message’s overall exposure and reach, however, is an easier undertaking than understanding how that message is affecting and impacting an audience (Chapman, Heater, McEwen, Stacks). To understand and evaluate a message’s overall exposure and reach, one can look to data on metrics such as audience interactions, likes or shares on social media platforms, clicks on an online news story, television viewership ratings, or even retail purchases (Astorino, Heater, McEwen, Rosen, Teller). Exposure is generally measured in terms of both reach and frequency of exposure. For example, target rating points (TRPs), a standard advertising industry metric, is calculated as the share of the target audience that is reached times the number of times they are exposed to the message. A generally accepted practice is to attempt to achieve a minimum of three exposures among a target audience (McEwen).

Understanding and evaluating a message’s longer-term impact and effect on an audience is more challenging (Chapman, DeBello, Heater, McEwen, Stacks). Audience polling, survey, and focus group data can provide useful insight on impact, but it is not always conclusive. Moreover, if a message or communication is designed to sell a product, it can be challenging to discern whether a customer is making a purchase because they connected with a brand or message or are doing so randomly. There are many factors that influence behavior. It is naïve to think that one message will likely achieve widespread change. It is, however, one ingredient or variable in the overall influence and decision calculus that does drive behavioral shifts. Other factors (situational, environmental, cultural, monetary, opportunistic, etc.) are also important to consider. A key to understanding impact is to discern the shift in behavior that occurred after the communication took place. While this cannot be considered causal, the time series aspect of that type of analysis does lend support that it is reasonable to assume that, at a minimum, it may have influenced the result (McEwen).

Evaluate and Understand Trends Within the Audience

Communicators should attempt to evaluate and understand trends, both consistent and emerging, in their target audience's sentiment and perceptions over time. Understanding such trends enables communicators to better recognize and predict how their targeted audience will react to specific messages and different content, themes, and media. Evaluating trends should be a fluid process that includes constant gathering of audience feedback on the messages being sent (Chapman, DeBello, Teller). One effective approach to measuring and evaluating trends in an audience's sentiment and perceptions is by reaching out directly to members of that audience, through some means able to capture audience feedback. As with evaluating a message's impact and effect, audience polling, representative panels, surveys, and focus groups are effective evaluation methods for garnering such insight (Astorino, Chapman, DeBello, Heater, McEwen).³ Scenario forecasting can also be an effective tool for predicting trends and trajectories relating to audience sentiment and perceptions (Coon).

The Impact of Organizational Structure on Effective Messaging and Communication

Several contributors also indicate that organizational structure can impact an organization's ability to effectively message and communicate externally. Entrenched bureaucratic and hierarchical processes and structures within an organization can be a barrier to effective communication (Astorino, DeBello, Teller, Rosen). Alternatively, organizations that are nimble, agile, and able to message and respond quickly are typically the most effective external messengers and communicators (Astorino, DeBello, Heater). Moreover, as the contributors suggest, the most effective organizations in terms of external messaging and communication are typically those that have a central, overarching, guiding idea and message in which the entire organization can believe in, work toward, and support through messaging content and execution (Astorino, DeBello).

Conclusion

Overall, the contributors largely echo a consistent set of best practices for effectively messaging and communicating to influence and inform targeted audiences. As a whole, these best practices highlight the importance of having a well-thought-out communication plan and process—particularly one that ensures a proper understanding of the objectives and target audience at the onset, promotes appropriate and effective messages and messengers, enables monitoring and evaluation throughout, and is agile and able to be adjusted and optimized as needed. More specifically, these best practices, as outlined by the contributors, include:

³ Qualitative methods such as focus groups are not projectable but can uncover specific issues in depth for further exploration.

- Do research to develop knowledge and understanding of the target audience.
- Have a communication plan and set clear and measurable objectives.
- Tailor and localize both the messages and messengers to the targeted audience.
- Promote credible, coherent, and consistent messages.
- Connect emotionally, when appropriate, with those receiving the message.
- Strive to maximize both the reach and impact of the messaging effort.
- Quickly and aggressively counter false, harmful information, while also being careful to do so in a way that does not overamplify damaging information and messages.
- Evaluate the effectiveness of the messaging effort using measurements and metrics that relate to the established objectives, and adjust accordingly.

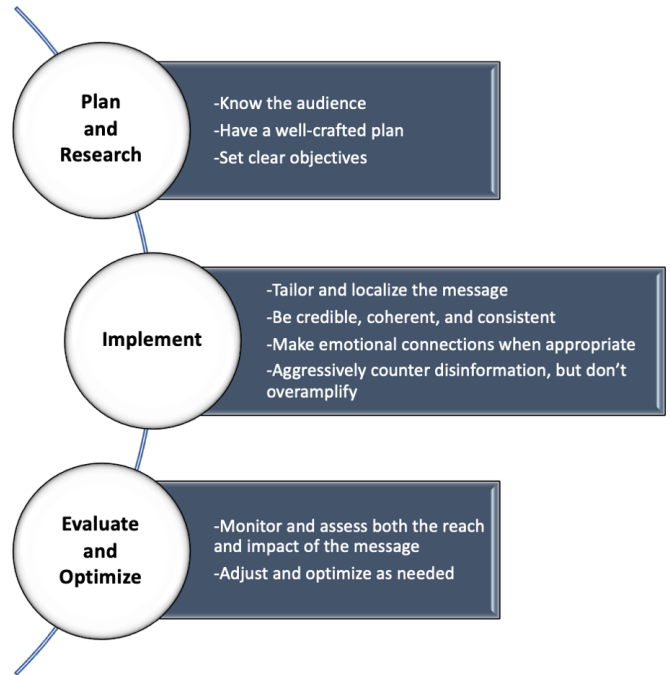


Figure 3: Best practices for effective messaging and communication

The contributors also make clear that there is a significant body of relevant research, insight, and experience from the advertising, branding, marketing, public relations, storytelling, and journalism fields on the topic of using messaging and communication to inform and influence different audiences. If the goal is to better understand how to effectively use messaging and communication as a tool of influence for targeted audiences, exploring the insights and lessons learned from these fields is likely a good place to start. This report offers a brief overview of some of those key, relevant insights from experts in those fields, but it is just a start. For a more comprehensive understanding of how to best use messaging and communication to influence, a deeper dive into those fields of expertise is certainly warranted.