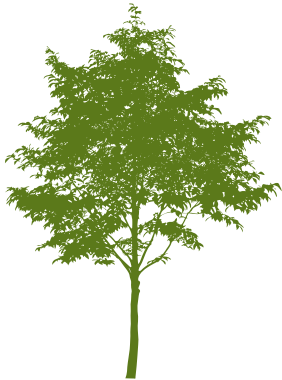


# Tools for Engaging Landowners Effectively



Yale SCHOOL OF FORESTRY &  
ENVIRONMENTAL STUDIES



**Center for Nonprofit Strategies**  
Clear Actionable Advice.

*This project was funded by State & Private Forestry of the U.S. Forest Service,  
Department of Agriculture, in partnership with Yale School of Forestry and Environmental Studies.*

# Table of Contents

- 2 **Introduction**
- 3 **Are You a Marketer?**
- 4 **Marketing Quiz**
- 8 **Introduction to Targeted Marketing**
  - Principles of Targeted Marketing
  - How Targeted Marketing Works
  - TIP** Rev Up Your Outreach
  - Targeted Marketing at Work: An Example
  - LEARN MORE** The 5 Ps of Marketing
  - TOOL** The Persuasion Slide
- 17 **Six Steps to Effective Communication**
- 18 **Step 1: Set Your Objective**
  - TIP** Use Indicators to Help Set a Good Communication Objective
  - TOOL** Ladder of Engagement
  - TIP** Set a SMART Objective
  - TOOL** SMART Checklist
- 25 **Step 2: Choose an Audience Segment**
  - TIP** Using the TELE Segments
  - TIP** How Big Should My Audience Segment Be?
- 28 **Step 3: Develop an Audience Profile**
  - TIP** Collecting Information for an Audience Profile
  - TOOL** The Stick Person
  - TOOL** TELE Segment Comparison Chart
  - TIP** TELE Data Profiles
- 38 **Step 4: Develop Your Message**
  - Steps to Effective Messaging
  - TOOL** The Because Statement
  - TIP** Professional-Speak to Landowner-Speak
  - TIP** Effective Message Strategies
- 47 **Step 5: Choose Channels and Materials**
  - LEARN MORE** The Power of Partnerships
- 50 **Step 6: Implement, Evaluate and Adapt**
  - LEARN MORE** Types of Evaluation Indicators

Dear Reader,

This workbook is intended for use in the Tools for Engaging Landowners Effectively (TELE) workshops, and as a post-workshop reference.

However, even if you have not attended a workshop, you will find this to be a good primer on the TELE approach to landowner engagement.

It has been written by the TELE team after six years of conducting workshops across the United States for many different organizations. The tools and tips have been developed and refined at these workshops. We are very grateful to the many groups who have participated in the workshops and provided us with excellent feedback and discussion that helped improve these educational materials.

SFFI Team  
June 2016

# Are You a Marketer?

Few natural resource professionals think of themselves as marketers, but perhaps they should. Boiled down to its fundamentals, **marketing is about communicating with someone to persuade them to take action**. A lot of your outreach is probably about getting landowners to take some action, whether it is getting a stewardship plan, or talking with a forester, or creating fire breaks on their property.

Educational outreach provides direction. It focuses on what to do and how to do it. Education works well when people are already motivated to act. When you educate landowners about an issue, you assume that they will act on that knowledge and take appropriate stewardship actions. But this may not happen, often because you're competing with all the other things people want to do with their limited time and resources.

The main difference between educating and marketing is that marketing involves motivation and persuasion. It calls on you—the communicator—to provide needed motivation *and* support for the desired actions. Marketers tap into people's values and emotions to give them compelling reasons to take the desired action. They then provide needed support to reduce barriers and increase the probability that audience members will take action.

Marketing techniques can help you tap into people's values and emotions to inspire good stewardship actions.

So, are you ready to be a marketer?

**MARKETING = EDUCATION + MOTIVATION TO ACT**

What to do.  
How to do it.

Why do this.  
Why act now.

# 10 questions to test your marketing savvy

1. It's best to include something for everyone in your materials because you can't predict what people will respond to.  
 True  False
2. Most people need to see or hear a message 4-6 times before they will take action.  
 True  False
3. Even though most landowners love their woods, they do so for different reasons and are receptive to different stewardship activities and programs.  
 True  False
4. The only way to collect useful data about landowners is to invest in survey research.  
 True  False
5. Marketing is about being able to sell things to people, even if they don't need or want them.  
 True  False

6. All outreach activities should be directed at promoting actions to achieve specific conservation goals.

True  False

7. Even if you offer a free service to landowners, there may be significant barriers to landowners taking you up on the offer.

True  False

8. Designing materials for a particular landowner type is useful even if your message will be seen or heard by all types of landowners.

True  False

9. It is important that your outreach materials look and feel elegant and “high quality.”

True  False

10. Evaluation activities should be kept separate from program implementation.

True  False

***ANSWERS ON THE NEXT PAGE***

## Answers to the Marketing Quiz

### 1. False

The most persuasive messages are organized around a single, compelling idea or argument that speaks directly to an important value or motivation of the target audience. See Introduction to Targeted Marketing on page 8 and Develop Your Message on page 38.

### 2. True

Research shows that, on average, it takes 4–6 contacts before a person responds to a message. See more on when and how to get your message out to people on page 47 (Choose Channels).

### 3. True

Love of the land is a common motivation among woodland owners, but it takes many different forms and is expressed in different actions, beliefs and attitudes. Effective messages reflect how a particular group of landowners relates to their land and to the desired stewardship action. Learn more about the four types of landowners based on their orientation to their woods on page 26 (Using the TELE Segments).

### 4. False

Survey research is just one of many sources of information that you can access to create a valid and useful audience profile to guide your communications. See Tip: Collecting Information for an Audience Profile on page 29.

### 5. False.

Effective marketing works *with* people's needs and motives. It is about linking desired products or practices to people's existing values, priorities and motives. See: The Persuasion Slide on page 16.

### 6. False

Even though your ultimate goal is to get landowners to take appropriate stewardship actions, landowners may not be ready or able to take those actions. You may have to lead them towards “big” actions through smaller “gateway” actions. Gateway actions may not have any direct impact on your conservation goals, but they serve to build trust, knowledge and confidence, thus paving the way for greater engagement and more meaningful stewardship decisions. See: Ladder of Engagement on page 20.

## 7. True

There are many reasons why landowners may decide not to take you up on your “free” offer. Engaging with your organization will require time and attention, two things that are in short supply for most people. In addition, there may be specific beliefs, practices, or values that work against landowners’ willingness or ability to implement a given stewardship recommendation. There may also be psychological barriers such as suspicion of your organization, or reluctance to cede control or close off one’s options. And finally, there may be social barriers at play, such as the potential for conflict or disagreement with family members or neighbors.

## 8. True

Your targeted audience segment is the sweet spot for your message, i.e. the people who are most likely to be persuaded by the message. This does not mean that other people won’t be influenced when they receive the message. Designing messages and materials for a specific audience segment makes them more focused, and often persuasive to others who may share some of your audience’s attitudes and attributes.

## 9. False

The look and feel of your materials should be suited to the content and the audience. The tone and style that works for wealthy, urban absentee landowners may not be appropriate for local farming families. See page 38 to learn more about tailoring the “personality” of your materials to your audience.

## 10. False

Evaluation is best seen as a feedback loop that enables you to constantly monitor your progress, track outcomes, and adjust and improve your outreach. See Types of Evaluation Indicators on page 51.

# Introduction to Targeted Marketing

**Targeted marketing means designing programs to persuade a specific group of people to take a specific action.** It differs from general, broad-brush outreach in that it seeks to reach and persuade smaller groups of people with messages that are specific to their needs and preferences and feel more personal and relevant to them.

Targeted marketing has been successfully used to change public norms and behavior on issues such as smoking, recycling, and seat belt use. TELE uses these same techniques to help you:

- Reach and engage different types of landowners;
- Persuade more landowners to implement stewardship practices;
- Achieve your conservation goals in specific landscapes; and
- Connect with landowners to serve them better.

## Principles of Targeted Marketing

- **Be clear about what you want people to do after receiving your message.** We emphasize *do* because it is more effective to design materials with clear action outcomes in mind. Yes, you want to inform and educate landowners but, for your program to be a success, you also need them to take appropriate actions. The objective of your communication should always be a landowner action. (See Step 1: Set your Objective on page 18)
- **Design your outreach for a specific type of landowner.** Different types of landowners are persuaded by different arguments and incentives. It therefore makes sense to design materials for specific groups that share similar values and will be persuaded by the same messages. (See Step 2: Choose an Audience Segment on page 25)
- **Take the audience's perspective.** Assess the target behavior from their point of view (See Step 3: Develop an Audience Profile on page 28) and provide arguments that will motivate them (See Step 4: Develop your Message on page 38).
- **Listen to your target audience.** Good communication, like good conversation, is a two-way exchange. Get audience input before designing your program, then seek feedback both during and after you implement the program. Pay attention to what landowners say and do (or don't do) so you can continuously improve your outreach. (See Step 6: Implement, Evaluate and Adapt on page 50)

## How Targeted Marketing Works

Landowners are not a homogeneous group. Their decisions about their land are grounded in different motives and considerations and they are swayed by different arguments and incentives. Targeted marketing enables you to identify segments of similar landowners so you can design communications that reflect their values, address their needs and concerns, and speak their language.

Targeted Marketing works better because:

- **People are more likely to notice and remember messages that are designed specially for them.** We are bombarded with so many messages every day that our brain has learned to filter out most of this “media noise.” However, messages that seem to be directly speaking to our needs, circumstances and preferences get through this filter. For example, if you’re looking to buy a car, you’re much more likely to notice advertisements for cars. Or, if you’re an environmentalist, messages that highlight the environmental impacts of a product are likely to get your attention.
- **Targeted marketing taps specific motivators and barriers to translate landowners’ awareness and knowledge into actions and behaviors.** People take action for different reasons. They are driven by different values and motives; intimidated by different barriers; and propelled by different incentives. By targeting your message to a group of people who have a similar decision frame for the target behavior, you can tap their strongest values, address the biggest barriers, and highlight the most compelling benefits to drive action.

We often think that if we just list all the benefits and motives, people will pick the ones that apply to them. That’s simply not the case. You have to select the contents of your message so that it hits all the right chords for your target audience without hitting any false notes or wasting their time and attention on irrelevant material.

- **Targeted outreach is more efficient.** Think of targeted marketing as using the right bait to catch fish. You’re much more likely to get the fish you want if your bait is attractive to that kind of fish. If you want a mix of all the different kinds of fish in the lake, your best bet is to cast your line several times, each time baiting it for a specific kind of fish. You’ll be more successful than if you use one generic bait which none of the fish will bite.

***Remember: If you design your materials to appeal to everybody, you may end up convincing no one at all.***

## Why Segment?

Think of targeted marketing as using specialized lures to catch specific kinds of fish.



“Worms? Look, pal, if you want to catch a shark, you need to use the right lure.”

## TIP

### REV UP YOUR OUTREACH

Targeted marketing works because it pushes you to understand the people you're trying to reach and find ways to connect with them. Here are some ideas to try out in your next outreach program:

**Solve their problems.** The easiest way to get landowners to pay attention to your materials is to lead with their questions and concerns. Once you have their attention, you can give them new information and ideas.

**Speak their language.** Don't use technical terms that might be familiar to you but not to your audience. Instead, use language that landowners use themselves. (See Professional-Speak to Landowner-Speak on page 43).

**Connect through shared values.** Highlight the values you share with your audience and let them know you understand their perspective on the issue. This makes your message more believable and relevant to your audience.

**Lead strongly.** Organize your message around one or two points that are likely to resonate with most, or many, members of your audience. Don't list all the reasons to take a particular action, hoping that people will focus on the ones that make the most sense to them. That's asking people to do too much work—if they don't see a good reason up front, they won't pay attention to your message.

**Be realistic.** Make sure people have the resources to do what you're asking them to do. If the desired action or behavior doesn't fit with their worldview at all, back up a little—perhaps you can ask them to do something else that fits with their resources, is less intimidating, or more acceptable. (See The Ladder of Engagement on page 20).

**Make sure that your audience is exposed to your message several times and in the right contexts.** Do you remember all the advertisements you saw on TV last night or all the billboards that lined your route to work? Neither do the people you want to reach. You have to work hard to get people's attention. And most people need to see or hear (preferably both) a message several times before they decide to act on it. (See Choose Channels on page 47).

## Targeted Marketing at Work: An Example

Targeted marketing points towards simple changes which can lead to big differences in how your message is received. At a TELE workshop in South Carolina, representatives of the Indian Creek Woodland Savanna Restoration Initiative discussed a flier designed to attract woodland owners to an upcoming event. As the group immersed themselves in the TELE approach, they made some key changes to make the flier more appealing to their target audience: Woodland Retreat landowners (See page 33 to learn more about Woodland Retreat owners and other TELE segments). Both the original flier and the revised version are presented on the next page. The key changes made by the team are highlighted and explained.

**1. Title** The title in the original flier is very long and technical. The average landowner is unlikely to know anything about the project and won't be moved to action by reading the name of the project.

The new title appeals to the Woodland Retreat landowner's sense of community. It also draws upon a key landowner insight—that they take pride in the tradition of quail hunting—and uses quail as a hook to engage the reader. The subtitle is behavior-focused and immediately tells the reader that they could benefit by attending this workshop. It also reassures landowners who may think their landholding is too small for them to participate in this workshop.

**2. Text** The new flier uses images to draw the reader's attention to this important text.

**3. Map** The original map is good for orienting the reader, but it does little to connect the reader with the natural landscape. Landowners who care about a particular river or forest may be left wondering whether the project will affect that area. The new map puts the natural features of the community into context. The additions of the rivers and forests also make the map more colorful and interesting without making it overbearing.

**4. Sidebar** The language in the original flier is very technical. Most Woodland Retreat owners know little of forestry practices. While some may be motivated to learn more about the practices mentioned here, most are likely to be confused or intimidated by this language.

Research tells us that Woodland Retreat owners do care about the benefits of healthy woods. The text in the new flier is much more understandable and leads with potential benefits to landowners. The list focuses on the effects of conservation practices rather than on the practices themselves. Woodland Retreat owners are likely to want these benefits and outcomes on their land and may, therefore, be drawn to the event.

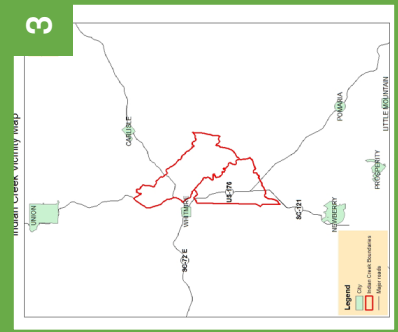
## BEFORE

### 1 Indian Creek Woodland Savanna Restoration Initiative Workshop and Tour

### 2 Newberry and Union County Landowners are cordially invited to attend the Indian Creek Restoration Initiative Workshop and Tour

**August 27, 2015**  
**Whitire Conference Center**  
 (1222 Glenn St, Whitmire, SC 29178)  
**9:00 a.m.-1:00 p.m.**  
 (Registration begins at 8:30 am)


### 3



### 4 Join Us...

.... to learn more about the financial and technical assistance available to local landowners to improve forest health by implementing forestry conservation practices, such as:

- Prescribed Burning
- Planting Trees
- Firebreaks
- Waterbars
- Grass Planting
- Critical Area Treatment



USDA is an equal opportunity provider and employer

For more information or to RSVP for this event, contact **Angela Snell** at 803-765-5682, or **Sabrenna Bryant** at 803-765-5419. *Space is limited.*  
 Online registration is available here: <https://www.eventbrite.com/e/indian-creek-delta-workshop-and-tour-tickets-17924907882>  
**Registration Deadline: August 20, 2015**

*This engaging workshop and tour is free and includes lunch.*

## AFTER

### 1 Be a Part of Restoring the Quail Legacy in your Community

*Learn how you can make a difference on your land for future generations. All lands matter, big and small.*

### 2



### 3



### 4 Join Us and bring a Friend...

.... For an introduction to financial and technical assistance available to you to improve the beauty, health and value of your woods. Learn about conservation practices, such as:

- Prescribed Burning
- Growing Healthier Trees
- Managing for Wildlife
- Protecting Water Quality
- Planting Native Species
- Treating Invasive Species
- Preventing Soil Erosion
- And more.....



USDA is an equal opportunity provider and employer

For more information or to RSVP for this event, contact **Angela Snell** at 803-765-5682, or **Sabrenna Bryant** at 803-765-5419. *Space is limited.*  
 Online registration is available here: <https://www.eventbrite.com/e/indian-creek-delta-workshop-and-tour-tickets-17924907882>  
**Registration Deadline: August 20, 2015**

*This engaging workshop and tour is free and includes lunch catered by Crisp Catering.*

## LEARN MORE THE 5 Ps OF MARKETING

Advertisements are the most visible outcome of a marketing strategy, but the marketing process is much broader and more comprehensive.

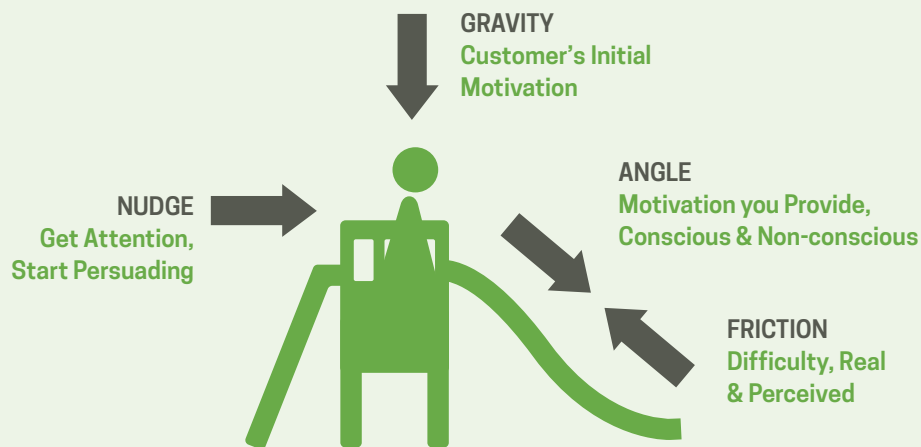
Marketing starts with the **product** itself. Marketers are careful to design products that have the features and functionality that their customers most want, while leaving out those that are less important to customers. They design the product and the production process so they can offer the product at a price that the customer is willing to pay. They then **place** these products to reach their customer at a time when they are ready to buy that product (ever notice how the chocolate chips are placed right next to the flour and sugar in the supermarket?). They match the **promotion** (i.e. the advertisements) to the overall product brand and experience they want to create, and create marketing **partnerships** to reinforce that brand.

Marketing is about aligning all these aspects of your “offer” with each other and with the needs and preferences of your target audience. The graphic on the next page shows how you can use the same thought process to “sell” the desired behavior to landowners.

The 5Ps teach us that the entire “offer” (not just the communication materials) should be aligned to the needs and preferences of your target audience. The action you want them to do should be relevant, attainable and matched to their needs (see Set a SMART Objective on page 22). You should do everything you can to make it easy and convenient for them to take that action, thereby minimizing the real and perceived costs of the behavior. You should try and get the message to them at times when they are most receptive to that information. And you should partner with organizations that can help you reach and influence your audience while strengthening your brand.



## TOOL THE PERSUASION SLIDE



Think of targeted marketing as if you are trying to get audience members to get to the bottom of a slide. In this analogy, the goal at the end, or bottom, of the slide is your target audience adopting the desired behavior.

So what can the slide tell us?

First of all, slides work with gravity, not against it. Your marketing effort must work *with* your audience's existing motivations. All the arguments you make in favor of taking action should tap into some motive that landowners already have. This could be a problem that they want to avoid, an outcome that they want, or a value that they want to live by.

The slide angle represents the reasons you give landowners to inspire them to take the action. The closer these reasons are to their fundamental needs, motives and values, the steeper the slide and the easier the path to the bottom.

Reasons why your audience may not adopt the desired behavior are analogous to friction on the slide. If the slide is a rough one (i.e. with lots of barriers to action), it needs to be steeper (i.e., the reasons you offer need to be a lot stronger).

Finally, the audience needs an initial "push" or nudge to get them on the slide. The ideal marketing message gives audience members that extra push needed to translate their good intentions into actions. For example, you might highlight the urgency of acting now (e.g. "remove invasive bushes now in the cold season before they get out of control in spring and summer"); offer time-bound benefits or incentives ("free consultation with a forester if you sign up today") or get people to commit publicly to taking action by a particular date.

# Six Steps

## To Effective Communication

1

### **Set Your Objective**

What do you want landowners to do after receiving your message?

2

### **Choose an Audience Segment**

Who is your target audience for this outreach effort?

3

### **Develop an Audience Profile**

What audience attributes and values can you tap into?

4

### **Develop Your Message**

How will you convince your audience to take action?

5

### **Choose Channels**

How will you reach members of your target audience?

6

### **Implement, Evaluate and Adapt**

Are you reaching members of your target audience and are they taking the desired action? What can you do better?

# Step 1

## Set Your Objective

### KEY QUESTION

#### What do you want landowners to do after receiving your message?

The first step toward effective communication is to be clear about what you want your audience—i.e. landowners—to do after receiving your communication. Your communication objective should be a simple sentence that uses an action verb to describe a behavior by landowners.

Here are some examples:

- Landowners will call the state forestry division to get more information about how to minimize invasive plants in their woods.
- Landowners will apply for our cost-share program funds to implement items in their stewardship plans.
- Farmers will plant windbreaks as appropriate for their farms.
- Woodland owners will sign up for a wildlife habitat assessment.

**A communication objective is not the same thing as your program goal** and should not be expressed in terms of the change you want to see on the ground. But your program goal and your communication objective should be related.

For example: If your program goal is to improve water quality in a watershed, your communication objective may be to get landowners to plant and maintain riparian buffers.

The connection between your communication objective and program goals may not always be so direct. Sometimes you have to meet landowners where they are and move them towards the desired behavior one step at a time. For example, your conservation goal could be a fire-safe landscape. To accomplish this goal, you may want landowners to implement appropriate fire-safe practices such as thinning, fire breaks, etc. However, your first step—and your initial communication objective—may be to get landowners to come to a community meeting to learn about fire safety. (See Ladder of Engagement on page 20 to see how to connect landowner behaviors to your program goals.)

## TIP

### USE INDICATORS TO HELP SET COMMUNICATION OBJECTIVES

Discussing benchmarks and indicators at the start of the program is an effective way to ensure that everyone is on the same page regarding what you are trying to accomplish. Indicators bring clarity to vague objectives. For example, the stated goal of your program may be to “increase good stewardship on the ground.” Discussing how progress towards this objective will be measured (e.g. number of stewardship plans written, acres treated against pests, acres of stands improved) helps clarify what practices and behaviors you’re actually trying to promote.

So, when you are discussing your program goals and finalizing your communication objective, ask your team: *How will we know whether our outreach effort is successful? What indicators will we (and others) use to evaluate this program? What benchmarks do we have to meet?*

(See Step 6: Implement, Evaluate and Adapt on page 50 for more on measuring success.)

## TOOL LADDER OF ENGAGEMENT

**PURPOSE: To help you connect your communication objective to your program goals.**

In an ideal world, all landowners would hear your message and take the needed action. However, we know that in the real world, most landowners are far from this ideal. Landowners fall on a spectrum, or Ladder of Engagement, with respect to stewardship actions. Some may not know anything about the threats to their woods; some may see problems but not know any solutions; others may want to take needed actions but not know how to get started. Still others may have already taken relevant actions on their land and may feel empowered to educate and help others.

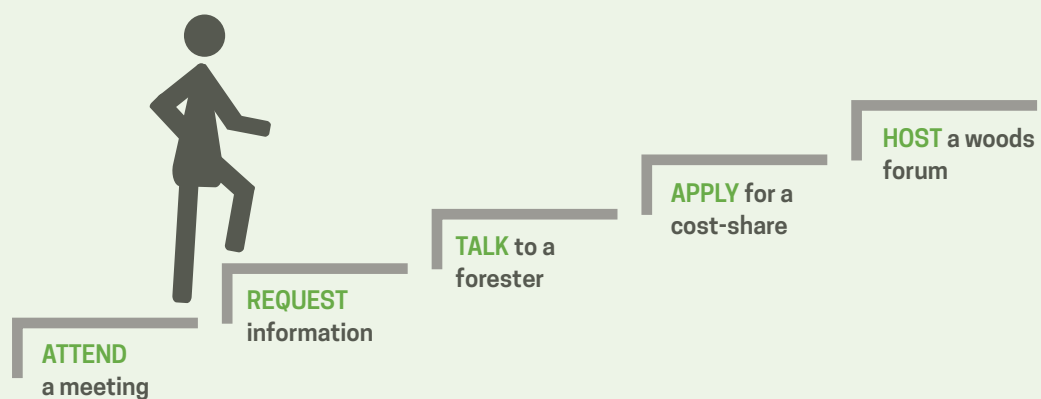
Depending on where landowners stand on this ladder, many stewardship actions can feel overwhelming or irrelevant to them. For example, if landowners in your community underestimate the threat of fire, detailed brochures about how to design fire breaks will seem irrelevant. And even if fire is seen as a significant threat, a slew of information about everything a landowner can do to reduce risks could seem overwhelming.

As communicators, it is our job to meet landowners where they are and help them move towards better stewardship one small step at a time. In many cases, this means starting with “gateway” actions such as asking landowners to seek more information or contact a professional; then moving on to simple stewardship actions, and, perhaps, periodic contact with forestry professionals; then, as landowners’ trust, confidence and commitment grow, they may be open to bigger investments that yield higher conservation values. In some cases, landowners may become even more committed and empowered, taking significant stewardship actions on their own land and inspiring and educating others to do the same.

Engaging landowners is a process. Your outreach goals should reflect where the target audience is standing on the ladder. But you must also have a plan to take them where you want them to end up. This tool helps you identify the steps that a landowner must take to get there.

The image shows a sample ladder for a common communication challenge: getting landowners to become engaged with the forestry community and

actively manage their woods. To start, you may want to get landowners to attend a community meeting so they become aware of the threats and opportunities for their woods, and understand the various ways in which your organization can help them. The next step may be for them to request information on specific topics that interest them. Following that, they may consult a professional to develop a stewardship plan and use cost share funds to implement one or more elements of that plan. As they become more knowledgeable and active on their own land, they may be empowered to educate and persuade others.



**Step 1** Attend a community meeting

**Step 2** Request more information on healthy streams and wildlife habitats

**Step 3** Talk with forester to prepare a stewardship plan

**Step 4** Apply for cost-share funds to build riparian buffers

**Step 5** Host a woods forum on riparian habitats

Now draw your own ladder, mapping out the steps that you want landowners to take.

- What do you ultimately want landowners to do (your conservation or management goal)?
- Where are they currently standing on the ladder of engagement?
- What is the most useful “next step” for them to get on the path to that conservation goal?

## TIP

### SET A SMART OBJECTIVE

The attributes of a good communication objective are nicely captured in the acronym SMART.

**S is for Specific.** Make sure that your objective is expressed in terms of a concrete and clear action by a landowner. Ideally, you should ask landowners to take a simple, observable action expressed in clear language that means the same thing to everyone.

Let's say you're planning to make a presentation on cost-share funds to a group of landowners. Here are three sample objectives for your talk:

1. *Landowners will come away with a good understanding of our state's cost-share program.*  
This is not specific enough because "understanding" is not observable and means different things to different people.
2. *Landowners will seek more information about our state's cost-share program.*  
This is somewhat observable, but "seeking information" could mean different things to different people.
3. *Landowners will call 1.800.ASK.COST to ask about the state's cost-share program.*  
Ah! You got it now! This is a specific objective.

**M is for Measurable.** How will you know whether you're accomplishing your objective? Good communication objectives can be logically tied to relevant indicators and measures and compared against a standard or benchmark.

Fortunately, the more specific your objective, the easier it is to track success. Of the three sample objectives above, #1 and #2 are fairly difficult to measure without extensively surveying or monitoring all the people that attended your talk. Objective #3, on the other hand, is easily measured if you log calls to the designated number.

**A is for Attainable.** Good objectives are ambitious, but realistic. Ask yourself: *Can landowners reasonably be expected to take this action?* Don't waste resources on a program that you know is likely to fail.

Setting attainable objectives requires a consideration of the resources and opportunities available to landowners. For example, if you're asking landowners to get stewardship plans, ensure that there are sufficient service or consulting foresters available to help them develop those plans. If you're asking them to harvest wood for sale, ensure that there are enough loggers, sawmills and timber buyers to make this action feasible. If you're asking them to plant trees, make sure your communications go out in time for the planting season so landowners have the opportunity to act on your message.

(See also: Ladder of Engagement on page 20, which shows how to break down complex goals into smaller actions for landowners.)

**R is for Relevant.** Your communication objective should also be relevant for accomplishing the outcomes you want to see on the ground. It's important to ask yourself: *Is this communication objective worth accomplishing? Does it get you at least part of the way towards the outcomes you want to see on the ground? And, do you have a plan for taking landowners the rest of the way so you can actually see outcomes on the ground?*

For example, many conservation partnerships host woods forums to facilitate information exchange and networking among woodland owners. In some cases, that is a worthwhile goal in and of itself. But if you want to accomplish specific conservation goals, you need to think through needed steps and actions to get there. *What would you like landowners to do after they leave the event?* You can build this into the agenda, so that there is a clear next step.

**T is for Time Bound.** Before you invest in a communication effort, determine when you expect to see results, and make sure all stakeholders (including funders) are on board with that timeline. Too many effective communication programs are discontinued before the effort bears fruit. An equal number of ineffective programs continue on in the false hope that they will yield results at some point in time.

Think of the right time frame for results. For simple actions like calling for additional information, you can expect immediate results. For more complex landowner actions like applying for cost-share grants, you might anticipate several intermediate steps and need to set a longer timeline. For some actions, like consulting a forester before harvesting timber, audience members may not have the opportunity to act on your recommendations for several years. In such situations, it is useful to set proxy measures or milestones to show progress. (See Types of Evaluation Indicators on page 51.)

## TOOL

### SMART CHECKLIST

Test your communication objective to see how SMART it is.

**Q: Could anyone easily observe a landowner doing the behavior that you've asked them to do?**

- Yes** – That's good! If you can make the objective more specific by adding how, when and where the landowner will take action, do so.
- No** – It's probably not specific enough. Think of a concrete, real action that you want landowners to take. (See Tip: Set a SMART Objective on page 22 for examples of specific communication objectives.)

**Q: Do you have a mechanism that lets you know (or estimate) whether landowners have done as you asked?**

- Yes** – Great! Try and think of both direct and indirect measures to show progress.
- No** – not measureable. Either think of an indicator you can use (even a proxy) or consider changing the objective.

**Q: Do landowners in your area have the opportunity and resources (e.g. knowledge, money, time) to take this action?**

- Yes** – Great! Also make a note of what key resources are needed to take action.
- No** – can you create the opportunities or provide needed resources (e.g. information, names of loggers, etc.)? If not, consider changing the objective or targeting the segment of the audience that has the needed resources (see Step 2: Choose an Audience Segment on page 25).

**Q: Does the landowner action directly further your conservation goals?**

- Yes** – That's terrific!
- No** – Do you have a plan for taking landowners who have taken the action towards the conservation goals? (See Ladder of Engagement on page 20).

**Q: Is everyone clear about when you'll see results?**

- Yes** – You're good to go! Make sure you set an ambitious but realistic time frame and have some milestones along the way.
- No** – Think about what factors will drive action (e.g. seasons, dissemination of the message) and see if you can come up with a relevant time frame. If not, re-evaluate the objective.

# Step 2

## Choose an Audience Segment

### KEY QUESTION

#### Who is your target audience for this outreach effort?

Segmenting your audience allows you to tailor your communication to address what is most meaningful to them. Think about what sub-group or type of landowner you most want to reach and persuade via this outreach effort. Remember, these are not the only people you will reach—they are just your “sweet spot,” the people that you’ll be addressing most directly and whom you’ll try hardest to persuade. Using the fishing analogy (see page 10), these are the fish for whom you’re baiting your line.

***Remember: If you design your materials to appeal to everybody, you may end up convincing no one at all.***

The simplest way to segment your audience is to pick one of the TELE segments as your target. TELE has identified groups of landowners who have a similar orientation to their woods and are therefore likely to have a similar set of motivators and barriers with regard to many stewardship actions. (See Using the TELE Segments on page 26).

You can also pick an audience segment based on other attributes, such as those listed below.

- *Landowners whose actions will be most influential towards achieving certain conservation goals.* For example: large landowners, or landowners with woods adjoining major streams, etc.
- *Landowners who are ready and able to take the desired action.* These could be people who are at the right step in your engagement ladder. For example, if your objective is to get landowners to access cost-share money for certain improvements, people who have stewardship plans may be your best audience segment.
- *Landowners who have strong stewardship attitudes.* TELE research shows that the majority of landowners have good stewardship values but relatively low engagement in management practices. TELE calls this group of landowners “prime prospects.” You can download data on the prime prospects in your state or region from the TELE website ([www.engaginglandowners.org](http://www.engaginglandowners.org)).
- *Landowners that you can reach most easily.* For example, if you’re planning to give a talk at the Ducks Unlimited annual meeting, you may want to target the talk to landowners who are also enthusiastic about hunting.

## TIP

### USING THE TELE SEGMENTS

The reason why a landowner owns woods is an important attribute that influences many decisions and actions regarding woodland management. TELE has identified four “types” of woodland owners based on their reasons for owning woods. These segments were developed by conducting a statistical analysis on data from the National Woodland Owner Survey.

The four segments are:

1. **Woodland Retreat owners:** They own land primarily for its amenity values, such as beauty and privacy, and environmental values such as protecting nature and biodiversity.
2. **Working the Land owners:** They value the lifestyle and amenities offered by woodland ownership, but they also see their woods as a financial asset and would like to generate some income from them.
3. **Supplemental Income owners:** These landowners see land primarily as a financial asset, although they may also appreciate recreational and other amenities offered by woodland ownership.
4. **Uninvolved owners:** They don't rate any reason for owning woods very highly. Often they have inherited land or own woods as part of a productive land holding such as a farm or ranch.

These four TELE segments have different orientations to their woods and their decisions about their land are driven by somewhat different motivations and barriers. Thus they offer a useful way to segment landowner audiences. Moreover, TELE has conducted focus groups with landowners to develop deeper insights into the attitudes and behaviors of these landowner segments. If you target your outreach to one of these segments, you can use TELE's description of these segments to understand your audience better.

## TIP

### HOW BIG SHOULD MY AUDIENCE SEGMENT BE?

The answer to this question depends on your communication objective and your landowner population. You should pick the largest audience group that is likely to share a similar orientation to the desired action.

Most natural resource professionals who interact with landowners have a sense of what “types” of landowners live in their districts. Use this information to design messages that speak more urgently and specifically to audience segment.

If there are big differences in what audience members believe about the desired action or what will motivate them to take that action, then you’re probably looking at two (or more) different audience segments. Rather than design a compromise message that attempts to incorporate elements that will appeal to both audiences, make a choice regarding which segment is your primary target and design primarily to persuade them.

Tone and style also make a difference. Your district may have a mix of urban absentee landowners who have vacation homes on their woodland and farming or ranching families that live on their land. The kind of materials and events that will engage these two types of landowners could be different.

# Step 3

## Develop an Audience Profile

### KEY QUESTION

#### **What audience attributes and values can you tap into?**

An audience profile is a summary of all attributes of your target audience that are relevant to the desired action. An audience profile should include information about:

- What values and ideas drive landowners' decisions about their land
- How (and how much) they currently interact with their woods
- Their attitudes towards the desired action
- Their knowledge and capacity to implement the desired action

It is also important to remember that woodland owners are simply people who own woods. Your audience profile will be even richer if it includes information about who your audience members are as people (and not just landowners). For example:

- What are the broad values and attitudes that underpin the culture of this community?
- Who lives in this community (demographic attributes) and how do they spend their time (lifestyle, pastimes, etc.)?
- What gets people's attention in these parts? What do they talk about?
- Who do people listen to? What channels and sources of information are influential in this community?

The Stick Person tool on page 31 is designed to help you compile and organize relevant information about your audience. It will help you create a mental picture of your "typical" audience member. The more real, clear and concrete this picture is, the better your chance of identifying key motivators and presenting them in a way that is compelling for your target audience. This profile will also give you clues on where and how to reach target audience members (e.g. what channels to use, what sources or partners could enhance your credibility, where you should hold meetings and forums, etc.).

Don't be afraid to make generalizations or skim over small differences in your audience profile. Your picture of the target audience doesn't have to be accurate down to the last detail. It just has to be close enough to reality so you can step into your audience members' world, understand their motivations, and evaluate the desired action from their perspective.

## TIP

### COLLECTING INFORMATION FOR AN AUDIENCE PROFILE

- **Start with the research.** Survey data is often a good place to start. TELE makes it easy for you to find relevant data on woodland owners in your state as well as specific segments of landowners. We have used data from the National Woodland Owner Survey to create data profiles of different segments of landowners (see: TELE Data Profiles on page 36). You should also check with your state universities and extension services to see if they have done surveys or other studies on landowners in your area.

Depending upon your objectives, legal or organizational records may also be valuable. For example, if your target audience is landowners who hunt, checking public records of hunting licenses will help you pinpoint your target audience members and give you clues about where (i.e. what towns or districts) you're most likely to find them. Or, if your target audience is landowners who are already doing some activities on the land, organizational records such as cost-share applications and permits can give you an idea of what actions they have already implemented.

- **Collective brainstorming.** You'll be surprised at how much you already know about landowners in your area. One technique that works well is collective brainstorming with your team. Each of you will have met different landowners and have a slightly different perspective on them. Pull your ideas together and you're likely to come up with a pretty accurate profile of the people you want to reach. Use the Stick Person tool on page 31 to cover all relevant information and come up with a rich, useful landowner profile.

When brainstorming, it is important to think about the qualities and attributes of a "typical" member of your audience segment. Of course there are some well-informed and super-motivated landowners who are constantly seeking better ways to improve their woods. These are probably the people you meet most often and know best. But, unless your program is specifically targeting these "model owners," be careful not to let them dominate your understanding of your target audience.

- **Talk to people who work closely with landowners in that area (e.g. service foresters, extension folks, etc.).** If you feel that you're one step removed from your audience members, ask people who interact frequently with your audience members to help flesh out and "ground truth" your profile. Use the questions in the Stick Person tool to guide those conversations. And, once again, be careful to collect information about typical landowners, not the most motivated and knowledgeable ones.
- **Talk to landowners (or watch them).** It's not difficult to invite a few landowners who fit your target audience for coffee and a chat, or to talk to them informally at a community event. But remember that talking with landowners is most useful when you want to fill gaps in your knowledge or test specific ideas that you've come up with. People are generally not good at giving accurate responses to very broad, open questions (like "What's important to you?"). Another useful strategy is to observe audience members "in their natural habitat." Careful observation can give you important cues about the culture and lifestyle of the communities that you want to target.

## TOOL

### THE STICK PERSON

#### **Purpose: To help you catalog relevant audience attributes.**

Landowners' decisions are driven not just by their attitudes towards a particular stewardship action, but by broader values, concerns, lifestyle, and culture. The Stick Person tool directs your attention to different aspects of your target audience members so you can understand them more completely. It yields rich audience profiles that help you identify potential motivators and barriers and incorporate ideas and features that appeal to audience members in your messages.

#### **Remember: Landowners are simply people who own land.**

The Stick Person tool is an aid for brainstorming and collecting information about landowners. Draw the figure on page 32 on a board and work with your team to list audience attributes in response to the questions in each of the four areas.

#### **Segment 1: What's important to them?**

Include core cultural values and ideas that frame your audience's worldview, as well as values that influence their relationship with their woods.

#### **Segment 2: What do they do?**

Use this area to list how audience members spend their time, including their work and their hobbies and pastimes. Especially look at behaviors that might be relevant, similar or contrary to the desired action. For example, if you are asking landowners to come to a community picnic, consider whether they are accustomed to this kind of event and what they might expect of it.

#### **Segment 3: What gets their attention?**

Use this area to list channels and sources of information that audience members attend to as well as topics that tend to get their attention.

#### **Segment 4: What do they know and believe about the desired action?**

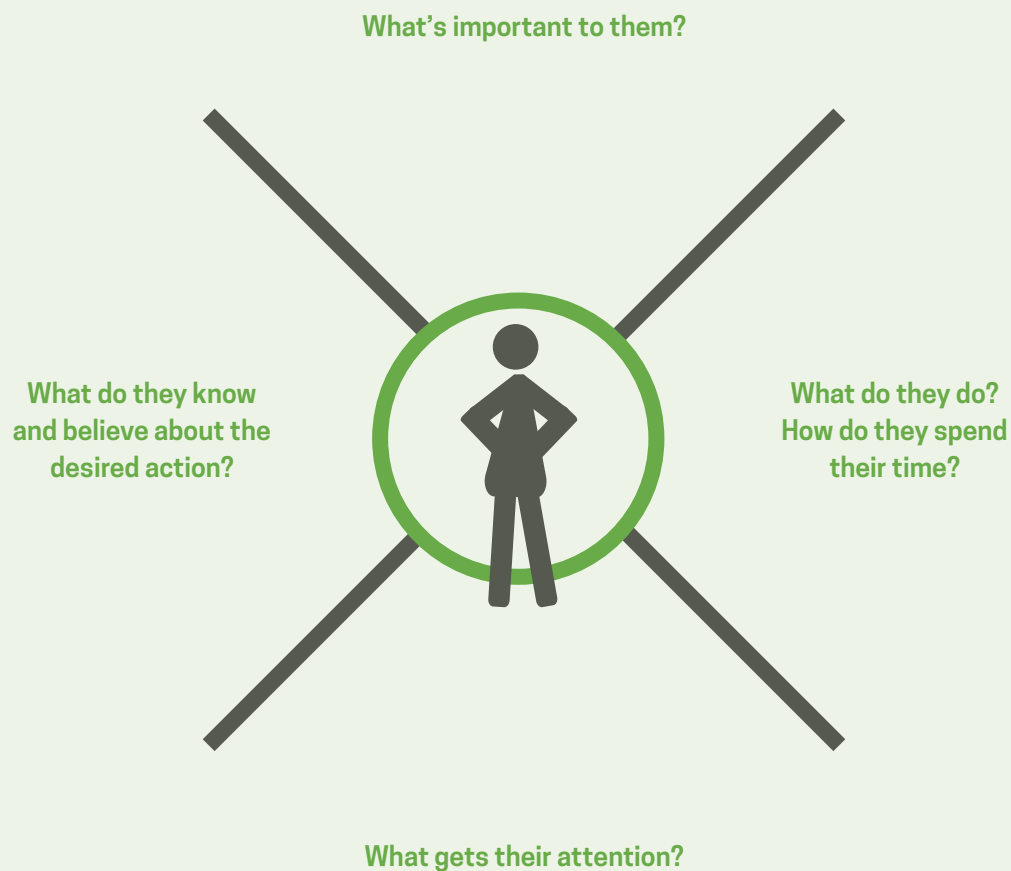
In this area note current knowledge levels and attitudes relevant to the desired action. What are they hearing from others? Does it support or work against you? If it works against you, how will you counteract this opposing message?

As someone calls out an attribute, jot it down. Don't worry too much about writing each bit of information in the right area—the goal is simply to list everything you know about your target audience members.

The information you include in the Stick Person brainstorm tool can come from several sources. You can use TELE segment descriptions (see page 33) or TELE data profiles (see page 36). You can use other survey or focus group research on landowners in your area. And, most importantly, you can use what you know from observing and interacting with landowners in your area.

After you've listed everything, collectively evaluate all the information you've got. Underline or circle the things you all think are most important and definitely true. Conversely, if there is some disagreement regarding some landowner attributes, put question marks next to them.

The Stick Person tool helps you create a mental image of your "typical" target audience member. **Turn to page 39 to learn how to apply this information to develop a persuasive message.**



## TOOL TELE SEGMENT COMPARISON CHART

TELE divides landowners into four broad groups based on their reasons for owning land. Because this analysis focuses on motivations, it is a particularly useful grouping strategy for designing communications with landowners. These segments are compared and contrasted in this chart.



**WOODLAND RETREAT**



**WORKING THE LAND**



**SUPPLEMENTAL INCOME**



**UNINVOLVED**

### NATIONAL PERCENTAGES OF OWNERS AND ACREAGE (OWNERS OF 10+ ACRE PARCELS)

44% owners; 32% acres

24% owners; 31% acres

17% owners; 24% acres

15% owners; 13% acres

### ORIENTATION TO WOODLAND

Own woodland primarily for its beauty, conservation and recreational value

Many love nature and animals and appreciate ecological benefits of woods

Tend to be pragmatic; value aesthetic and recreational benefits of woodland but also see woods as a financial asset

Tend to own land primarily for timber income and investment

Tend not to care about woods; assign low importance to their financial, recreational, and aesthetic benefits

More likely than the other segments to be willing to sell their land and less likely to want to see it stay woodland

### THESE LANDOWNERS ARE SEEKING INFORMATION ABOUT...

Land improvement (trails, ponds, streams, etc.)

Keeping the woods healthy, beautiful and good for wildlife

How to choose reliable loggers and other service providers

Financial assistance for improving or maintaining their land

Timber market trends and rates

How to choose reliable loggers and other service providers

Protecting woods from natural and human threats

Entrepreneurial activities like cultivating NTFPs (to garner extra income from woods)

How to improve wildlife habitat

Financial assistance for improving or maintaining their land

Timber markets

Government programs, especially tax incentives and cost-share programs

How to protect their legacy; estate transfer issues

How to maintain the long term health and value of the land

Emerging threats and invasive species

Ways to minimize land maintenance and management costs

Estate planning and land transfer

**WOODLAND RETREAT****WORKING THE LAND****SUPPLEMENTAL INCOME****UNINVOLVED****CURRENT STEWARDSHIP BEHAVIORS**

Despite their stewardship orientation, they have some of the lowest rates of active land management behaviors like having a management plan, consulting foresters, or using cost share programs

The most likely segment to participate in a cost-share program (19%), or have a management plan (21%)  
More likely to have taken active steps to improve wildlife habitat

Second most likely of all segments to participate in cost share programs and have management plans (but still small proportions)  
Most likely to have worked with a forester, typically for timber sales

Along with Woodland Retreat owners, least likely to have a management plan or participate in a cost-share program

**MAIN MOTIVATORS OF STEWARDSHIP ACTIONS**

Stewardship ethic  
Natural beauty and wildlife protection  
Enjoyment of woods with family members, e.g., walking, hiking, camping and fishing

Maximizing ongoing returns from woods without damaging the land ecologically or financially  
Ethic of respectful and judicious land use  
Enjoy recreation on land (including hunting); also enjoy tending their woods

Want to maximize financial benefit from woodland  
Concerned with long-term health of land (mainly to ensure it stays financially productive)  
Want to keep land intact for heirs

Want to reduce taxes and land management hassles  
Want to minimize problems on the land (e.g. vandalism, trespassing)  
Many in “holding pattern” until they can figure out what to do with the land or pass it on to the next generation  
Want to keep land intact for heirs

**MAIN BARRIERS TO GOOD STEWARDSHIP**

Lack of knowledge about what actions to take  
Perception that woods manage themselves—many believe minimal human activity and interference is best way to promote woodland health  
Many have small parcels of land, making some land management activities less practical or more expensive  
Financial constraints

Fixed ideas about what is good for woods; feel they know best  
Mistrust of outside authority and expertise (e.g., fearful of getting swindled by loggers and consultants)  
Wary of any limitations imposed on them (big barrier to participation in conservation easements or even tax relief schemes or cost share programs)

Skeptical of most programs that impose restrictions on land use; might try to “work around” program requirements or do the minimum necessary  
Need to be convinced that stewardship behaviors are cost-effective, at least in the long run; altruistic or environmental reasons are a harder sell

Lack interest and/or knowledge to improve/ manage their woods

**WOODLAND RETREAT****WORKING THE LAND****SUPPLEMENTAL INCOME****UNINVOLVED****HOW TO REACH THIS SEGMENT**

Give them specific, easy, low-cost actions to achieve their objectives (e.g. attracting wildlife)

Challenge their belief that woods are best left alone

Help them understand the ecological significance of all woods (even small parcels)

Appeal to their sense of responsibility and stewardship

Affirm their outdoorsy lifestyle and traditional values

Give them information but don't tell them what to do—accept their independence and cautiousness

They actively seek information on land management; most like getting information through word of mouth, relevant publications and direct mail also work

Emphasize ways to enhance financial gains or maintain land value for future generations

Ready to learn more about land management—especially if it yields immediate or long-term financial benefits

Most keyed to the forest industry and “forestry” community, including landowner associations, trade publications, and events

Not an easy target for conservation or woodland management campaigns

Messages should identify direct financial benefits, preferably without too much effort on their part

May be more receptive to incentives and programs that benefit both farms and woods

Can be reached by direct mail and traditional channels to reach farming community

**DEMOGRAPHIC AND SITUATIONAL FACTORS**

Education level is higher than other segments

Most live on their woodland

Most live on their woodland

Many do not live on their woodland

Have the largest plot sizes

Many do not live on their woodland

Tend to be older than other segments

Most likely to have a farm (1 in 3)

Most likely to sell their woodland

**Photo Credits, page 33.** Woodland Retreat: Chesapeake Bay Program. Working the Land: NRCS photo by Tracy Robillard. Supplemental Income: USDA NRCS Texas.

## TIP

### TELE DATA PROFILES

TELE uses data from the National Woodland Owner Survey to create profiles for different landowner segments. Currently, the TELE website houses data profiles for the following landowner segments:

#### **Geographic Segments**

- Family landowners with 10+ acres of wooded land, in the US as a whole and in each state and region (TELE presents profiles for every state for which we have a sample of at least 100 survey respondents.)

#### **Segments based on attributes of the land and the ownership**

- Landowners with larger landholdings, i.e. 50 acres or more
- Landowners with smaller holdings, 10–49 acres
- Non-resident landowners, i.e. landowners whose home is more than a mile from their woodland
- Landowners who have a vacation home or secondary residence on their land
- Farmers
- Landowner who receive some income from their woodland
- Landowners who rate legacy as an important reason for owning their woodland
- New owners, i.e. landowners who have owned land for less than 10 years

#### **Segments based on landowners' attitudes and behavior**

- Landowners in the 4 TELE segments: Woodland Retreat owners, Working the Land owners, Supplemental Income owners and Uninvolved owners
- Landowners who have harvested timber in the past
- Landowners who plan to harvest timber in the future
- Landowners who have received professional advice
- Landowners who have a management plan

- Landowners who have conservation easements on their land
- Landowners who have high, medium or low engagement in stewardship and conservation practices (as determined by the number of practices they have implemented)
- Landowners who are high, medium or low on environmental/conservation attitudes

### **Demographic segments**

- Landowners from minority groups
- Women sole owners

### **TELE profiles contain the following information for each landowner segment:**

- Tenure and size of landholdings
- Landowners' reasons for owning woods
- Landowners' concerns about their woods
- How they use their land
- If and how the land is managed
- Where they get information and advice about their woods
- How they would like to receive information and advice
- Future plans for their woods
- Demographic information such as gender, age, income and education levels

So whether you want to know more about all the landowners in your state, or a specific group of them (such as farmers, or absentee landowners, or those who have harvested trees), you can find a data-based profile for that landowner segment on the TELE website. (Please note that if the sample size is too small for your state, the data are not published. You can look at data for another state that is similar to yours or for your region.)

## TOOL THE BECAUSE STATEMENT

**Purpose:** To help you distill the main motivators for action into a convincing message argument.

### Step 1:

This exercise starts with the results of the Stick Person tool (see page 31). Go through the audience attributes you've listed to identify reasons why your audience would or wouldn't take the desired action. In the Pain column of this chart, list all the barriers to the targeted action (e.g. too expensive, not enough knowledge, etc.). In the Gain column of the chart, list all the benefits of taking that action that landowners may find attractive (e.g. earn money, protect their children, etc.).

It is crucial to fill out these columns from your audience's perspective (not your own). For example, "restoring longleaf pine ecosystems" may be a valued benefit from your perspective, but your landowner audience may not set much store by it. Similarly, you may not think that thinning stands is a particularly complex task, but your landowner audience may well be intimidated by the prospect of finding a trustworthy logger to do the job.

PAIN	GAIN

# Step 4

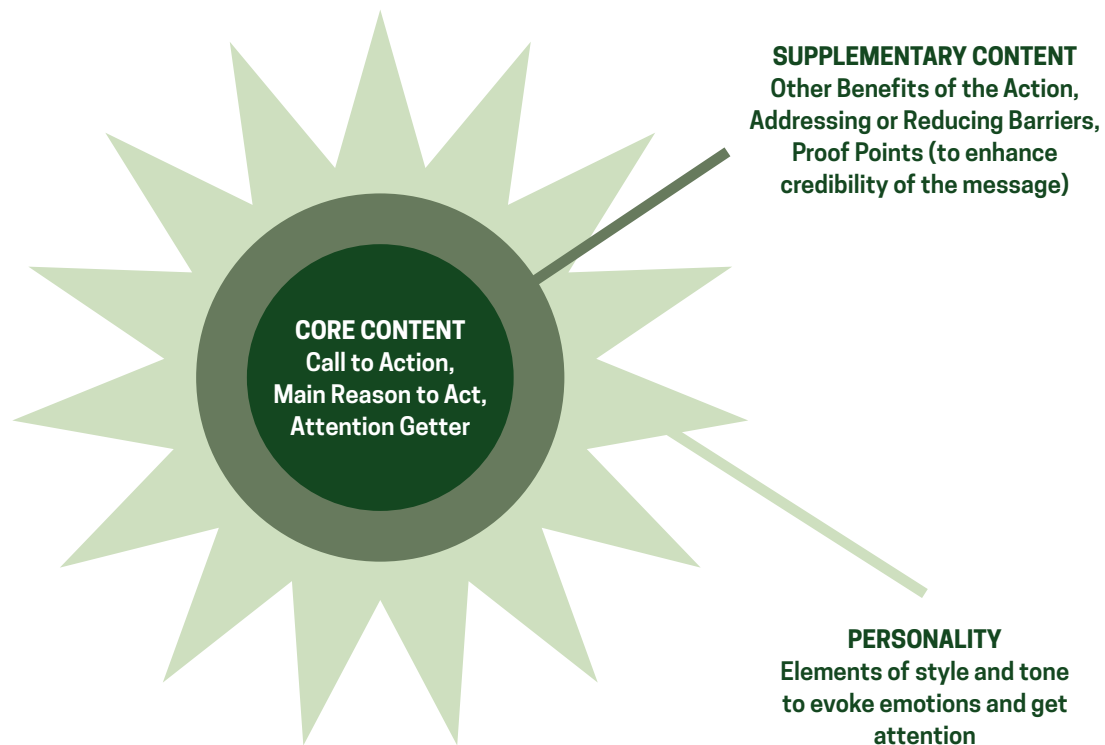
## Develop Your Message

### KEY QUESTION

**How will you convince your audience to take action?**

Good messaging involves making a specific call to action and giving audience members a compelling reason to take that action. Whether you're designing a postcard or an entire presentation, your communication should be organized around 2–3 strong, interrelated ideas to drive home a single, compelling reason to take the desired action. Other benefits and arguments can be used as supporting elements as can ideas that directly address or undermine barriers to action.

Good messages also have something—content, visuals, format or style—that attracts the target audience's attention. The style and tone of your materials contribute to the impact of the message by evoking the right emotion to drive action. Just like a picture frame can greatly enhance or detract from the art, the *personality* of your materials can enhance or undermine your message.



## Steps to effective messaging

**1. Finalize your call to action.** Review your communication objective and make sure that you're asking landowners to take a clear, concrete action (Specific), that they are ready and able to take (Attainable), and that relates, directly or indirectly, to the impact you want to see on the ground (Relevant).

**2. Decide your main message argument.** Focus on one strong reason for target audience members to take the desired action. While there may be many benefits of the desired action, choose one that will be the main thrust of your message to landowners. This should be a reason that feels strongest and most compelling *from your audience's perspective*. Even better, it could be a broad theme that encompasses many smaller benefits and motives. (Use the "Because Statement" tool on page 41 to help you with this step.)

**3. Decide your main emotional appeal.** Do this by answering the question: *How will taking this action make landowners feel?* And be careful to answer that question with an emotion, for example: "It will make them feel proud." or "It will make them feel less anxious about losing their trees." (Note: "It will make them feel like they've done something good" is not an emotion.)

**4. Determine the supporting content.** Choosing one compelling message argument doesn't mean that you can't include any other ideas in your message. Other relevant ideas and information can be incorporated into your message as additional benefits and/or examples and elaborations to substantiate the main message. You can also include content that directly addresses or reduces some of the barriers to action. Just make sure that this additional content is compatible with the main argument and doesn't undermine it in any way. Also, don't overload the message—having more than 3–4 different ideas is distracting. A general rule of thumb is to only include information or ideas that make your main message more relevant to the audience, more believable or more persuasive.

**5. Determine your message's personality and how you will convey it** (visuals, tone, format, etc.). The style, tone, and visuals of your message communicate as much as its content. Choose them purposefully to support the content and emotional appeal of your message. For example, if you're inviting landowners to a formal reception, make the invitation look and feel special. Conversely, if you're inviting people to a community picnic, make sure your invitation reflects the casual feel of the event.

**6. Identify your Attention Getter.** To have any impact at all, your message has to cut through the media clutter to reach your target audience, and affect them strongly enough that it stays in their mind. Think about how you will do that.

Often, including something dramatic or surprising gets people's attention. It may be a particularly dramatic picture or the design of your materials. Or, it could be a piece of information that is surprising and really drives home your argument. Another strategy is to include phrases or visuals that are very specific to your audience and make them feel that your message is specifically designed for them. For example, one team in Hawaii used a traditional word for ecosystem in messages directed to families that had owned land for several generations.

## TIP

Thinking about the content, look and feel of your materials is easier if you know what materials you will create, e.g. a brochure, a postcard, a presentation, or a website. So, take a few minutes to visualize a good format for your message. You may change this later when discussing channels in Step 5.

**Step 2:**

Once you have listed the “Pain” and the “Gain” landowners associate with the desired action, evaluate the “gain” items against the “pain” items to identify benefits that are (or could be) compelling enough to override the barriers. Then try to distill these compelling benefits into a single “overarching” theme.

You may not be able to arrive at a single theme that encompasses all the benefits of a behavior, but you can usually categorize all the main benefits into 2 or 3 broad themes. If that’s the case, pick the strongest theme to form the core of your message. The others will be used as supporting elements of the message.

**Step 3:**

Finally, relate the core theme to an emotion.

Think about how landowners will feel when they take the desired action and receive its benefits.

**Step 4:**

Use this theme to complete the following statement:

**[Target audience segment] will do [desired action] because [benefit theme]. Doing this action will make them feel [emotion].**

This is a concise statement of your basic communication strategy. It states whom you’re targeting, what you’d like them to do, and what reason you’ll give them to do it. It also states what emotion you want your message to evoke.

The Because Statement is not your message to the landowner; it is an internal “compass”, to remind you of why you believe the landowners will take the desired action. You can use the Because Statement to start developing message content as described on page 39. If you’re working with a copywriter, use this statement to orient them to the task and frame your discussion of message content and style.

Here is a sample Because Statement adapted from an outreach effort designed to engage farmers in efforts to keep their woods healthy. This group realized that most farmers give little thought to the health of their woods. However, they could be persuaded to take simple steps to reduce negative impacts on their woods if they came to think of their woods as an

integral part of their overall landholding, with the potential to contribute to the health and productivity of their farm.

*Farmers with more than 100 acres of woodland (most of whom are Uninvolved Woodland Owners) will attend a meeting on healthy woods and farms because they want to increase the value and productivity of their farm. They will feel proud about being able to maximize their income while being good stewards of the land.*

## **TIP** **PROFESSIONAL-SPEAK TO LANDOWNER-SPEAK**

The words that professionals use are not the same words that landowners use. Some are more technical, some are just different. It's always best to use language that landowners use and understand. The table on the next page shows some of the most important language differences between "professional speak" and "landowner speak."

The words and phrases suggested in the table on the following page are offered as guidelines. There are regional differences in how people refer to their land, woods, and the animals that live there. If you know the specific words that your target audience uses, you should absolutely use those in your communication. If you're not sure, just spend some time listening to audience members and you'll soon learn their "lingo." If you want to read more about this, go to our resources page on [engaginglandowners.org](http://engaginglandowners.org) and look through the focus group reports.

*See next page for words to use and words to avoid.*

WORDS TO USE	WORDS TO AVOID	NOTES AND EXPLANATION
Woods Land	Forest	Most woodland owners think about their land as a whole and often just refer to it as “land.” When they talk about their forested land they typically refer to it as woods. Forests usually bring to mind larger tracts of land, someplace else and usually owned by governments or corporations.
Woodland owner or landowner	Family forest owner	See above. Landowner works because many woodland owners see their woods as part of an overall landholding that also includes a home, a farm, or pasture.
Caring for the land, looking after the land Being a good steward	Technical terms like sustainable management	The word sustainable is suspect to many landowners as it implies an environmental agenda. Management is often perceived as something dictated by external forces, a loss of control. Stewardship is okay; most landowners view it as encapsulating an ethic of taking care of the land.
Wildlife, critters	Animal population, specific animals (like deer)	Animal population is too scientific. Since landowners differ in what animals they regard as attractive or pests, talking about attracting specific animals could backfire. Focus on a particular critter (like quail or songbirds) only if you know that your audience cares about that species.
Recreation, enjoy the land	Hunting (which some people love but others hate)	Hunting is an issue on which landowners are sharply divided; it elicits strong emotions. So, avoid specific references to hunting unless you know how your audience will respond to them.
Harvesting trees	Logging, timbering	Harvesting implies a more thoughtful removal of trees with the health of the woods in mind.
Keeping woods healthy	Silviculture, forestry	Many landowners don’t want to learn technical terms. Forestry often has a negative perception, especially among Woodland Retreat landowners.
Conservation	Preservation	Conservation is generally viewed favorably, as caring for the land for future generations. Most landowners don’t see much difference between conservation and preservation, but for those who do, preservation can carry a negative impression. It implies “locking up” the land and restricting landowner rights.
Common names of flora and fauna	Technical names of flora and fauna	Landowners will be more likely to read the material and remember it.
Forester? Logger?		Many landowners confuse these two professions and really don’t know what a forester does vs. a logger. So, it can be important to explain these terms when you use them or be really specific about whom landowners should contact. Perceptions of these professionals vary from positive to neutral to negative depending on personal experience.

## **TIP**

### **EFFECTIVE MESSAGE STRATEGIES**

**The first step in developing a message strategy is to use what you know about your target audience to develop a persuasive argument that will move them to take the desired action.**

**Most compelling “reasons to act” fall into one of these four categories:**

1. **Solution to a problem:** Audience members believe they have a problem and that taking the recommended action will solve the problem.
2. **Access to a benefit:** Audience members want a particular benefit and believe that taking action will lead to that outcome.
3. **Expression of a value:** Audience members believe that the recommended behavior is warranted by a particular value they hold dear.
4. **Conforming to the norm:** Audience members believe that similar people (or people whom they want to be like) are already doing this behavior and approve of it.

Your target audience and behavior will determine which of these is the best message strategy for your campaign. The table on the following page gives you some ideas about when and how to use them.

*See next page for Effective Message Strategies.*

MESSAGE STRATEGY	WHEN TO USE	NOTES AND EXPLANATION
Solution to a Problem	The audience sees a threat or problem and you can convince them that taking the action will address that threat.	<p>Don't project your knowledge and perceptions on your audience— they may not see problems that are apparent to experts.</p> <p>Works well when communities have already been sensitized to a threat (like fire or pests) and believe that it can have a devastating effect on their woods.</p> <p>Try to make a clear and decisive connection between the action and reduction of a threat or risk. Raising anxiety without offering a good solution can prevent people from taking any action at all.</p>
Access to a Benefit	The action leads to outcomes that are attractive to landowners, especially outcomes that tie in with their reasons for owning woods. Examples could be: more beautiful woods, more recreational opportunities, or more money.	<p>Works best when the benefits of the action are clear and visible. This strategy is harder to use when the benefits are uncertain and/or emerge only after a long time.</p> <p>Even when dealing with a longer-term beneficial outcomes, draw attention to shorter-term rewards or indicators of the long-term benefit.</p>
Expression of a Value	<p>Use when you can make a strong, undeniable connection between a dearly held value and your target behavior.</p> <p>Do not use this strategy as a default approach--try other ideas first.</p>	<p>Try to look beyond the obvious value of good stewardship, which is very general and means different things to different people. Your target behavior might be more directly and easily linked to other values or identities, such as being a good neighbor or a responsible landowner; hunting culture and traditions; loving wildlife; smart investing; being knowledgeable, etc.</p>
Conforming to the Norm	Use when leaders and influencers in the community endorse the behavior and/or at least some landowners are able and willing to champion the behavior in their community.	<p>Peer pressure is a powerful motivator to move people from agreement to action. Works well when people already support an action but need an extra push to take it.</p> <p>Works best when the action and/or its effects are clearly visible in the community.</p>

# Step 5

## Choose Channels and Materials

### KEY QUESTION

#### How will you reach members of your target audience?

Once you have finalized your message strategy, you need to decide how you will get your ideas out to your target audiences. What dissemination activities will you undertake and what materials will you need to support those activities?

It is important to think about communication activities and materials together and budget adequately for both. Even the best-designed messages and materials cannot have an impact if they do not reach the target audience. In fact, when communication efforts fail, the most common reason is that they simply didn't reach enough people enough times to have a measurable effect on the problem at hand.

Effective outreach is resource-intensive. Don't be afraid to scale your outreach to match your budget. Remember, your goal is to drive landowner action. For that, it is better to reach 100 people effectively and persuasively than to broadcast your message to 1000 people who barely notice it.

Here are some tips for picking the right channels to get your message to landowners.

#### **Think local**

Our research with landowners shows that direct, local, and targeted channels work better than broad-scale advertising or Public Service Announcement (PSA) campaigns. When landowners see your message in local newspapers or hear it on local radio shows and at community events, they know your outreach is for and about them. In our research for the Call Before You Cut campaign, for example, most landowners said that direct mail is the best way to get information to them.

#### **Repeat (and do it again)**

You cannot expect to persuade people instantaneously. One common rule of thumb is that people need to hear or see a message 4-6 times before it begins to have an impact on their thinking and behavior.

It also helps if they hear the message in different channels and from different sources. Try to design your outreach so that people get the same (or similar) message several times in different ways. For example, you might start by sending landowners direct mail inviting them to a meeting. You might then post meeting announcements at locations where landowners are likely to see it. You could also

persuade the local newspaper to carry a story about why this meeting is important for the community and what topics will be addressed. Finally, if the presence of some landowners is crucial to your success, you could invite them personally or get other landowners to give them a call.

### **Timing is important**

Research also shows that intensive outreach, even if short-lived, can be very effective. People are more likely to remember something if they hear it twice in the space of a week than if they hear it twice over a six-month period. What this means is that periodic, intensive spurts of activity in a particular community are likely to be more effective than a slow, ongoing trickle of outreach activity.

Short, intensive efforts are even more effective if they are timed well. For example, an intensive outreach effort to build riparian buffers may be especially effective just after a community has experienced a flood. That would work even better if you were promoting riparian buffers as a good way to prevent soil erosion and flooding. Similarly, efforts to promote an action should be intensified during the season to take that action, so landowners can act on the message while it is still fresh in their minds.

## TIP

### THE POWER OF PARTNERSHIPS

Partners are the fifth P of the marketing mix (see page 14). And they are often the most under-utilized asset in a marketer's toolkit. This is not because people don't partner enough. They do, as evidenced by the slew of logos that appears on many outreach materials. The reason that most efforts fail to fully realize the benefits of partnership is because they do not choose and use partners in a systematic and strategic way.

#### **Here are some ideas to help make the most of your partnerships.**

Partners can help you disseminate your message to people whom you may not be able to reach otherwise. You can realize this benefit by choosing partners who can access different audiences than your organization. For example, if your state forestry division and the local landowner association have similar mailing lists, consider partnering with the Audubon Society or Ducks Unlimited to reach a slightly different pool of people (who might still fit your target audience).

Partners can also enhance your credibility, especially when reaching out to people who don't know you very well but are familiar with the partner organization. If Ducks Unlimited invites you to speak at their member meeting, you're probably speaking to an audience that is predisposed to react favorably because you are now associated with an organization they trust.

Unusual or unexpected partnerships are effective attention-getters. For example, a conservation group could partner with a timber company to promote prescribed fire to improve the health of fire-dependent forests for benefits to conservation, industry and the community. In very religious communities, consider reaching out to churches that could be sympathetic to your conservation message. Remember, though, that working with partners could require tailoring your message to fit their priorities and the preferences of their audiences and stakeholders.

Like all powerful tools, partnerships can also do harm. By aligning with partners whose reputation or public stance is contrary to your message, you can erode your own credibility. Remember that partnerships are never neutral. As soon as you share space with another organization's logo their reputation rubs off on you. So, choose your partners well and ensure that you both benefit from the association.

# Step 6

## Implement, Evaluate and Adapt

*Are you reaching members of your target audience and are they are taking the desired action? What can you do better?*

Evaluation and adaptation are integral to audience-focused communication. Targeted marketing calls on you to monitor audience responses to your outreach and use those insights to adapt and improve your program.

Evaluation can be intimidating if we think of it as a judgement about whether our programs have succeeded or failed. We all know that changing people's behavior takes time, and it takes even longer for human actions to translate into measurable environmental impacts. The complete impact of your outreach may not be apparent for several years, or it may be lost due to factors beyond your control.

That is why it is important to measure how well your program was implemented and how audiences received your message. These measures are early signals that the program is working as planned. They also give you the ability to refine and adjust your program based on what's working. For example, if you find that most people who call your hotline say they heard about you on the radio, you might want to increase your radio advertising budget. Conversely, if some channels are not attracting a good response, you should consider altering those activities or stopping them in favor of those that are working well.

We encourage you to think about evaluation as an ongoing feedback mechanism that gives you information about what's working well and what's not so you can use your resources more effectively. Every outreach effort can tell you something useful about your target audience, information that can help you improve future communications. The sooner you can incorporate this new information into your thinking and practice, the more effective you'll be as a communicator, and the sooner you'll see the results you desire.

This feedback mechanism does not have to be expensive. Often, a lot of useful data can be collected while you are implementing the program, e.g., by having sign-in sheets at presentations, asking landowners where they heard about your program, or monitoring how people are getting to your website. As a general rule, communication campaigns set aside 5% of their total budget for evaluation. Think of this money as a way to maximize the success of the current effort while investing in learning for the future.

## LEARN MORE

### TYPES OF EVALUATION INDICATORS

When planning your evaluation, consider these three types of indicators.

- 1. Process measures** tell you how well your outreach was conducted. They answer questions such as: How many people did we reach? Are we reaching enough people who fit our target audience profile? How are landowners receiving our messages? What feedback are we getting from our audience members and partners?

Process measures are about monitoring your outreach activities. The right process measures depend on the channels that you use. For example, if your outreach is organized around landowner meetings, you'll want to track attendance at the meetings and follow up with the attendees. If it's primarily an online effort, you'll need to track hits to your website, time spent by visitors, items downloaded, etc.

- 2. Outcome measures** are geared to your communication objective and tell you whether or not target audience members took the desired actions.

Many actions can be tracked quite easily, provided you put some thought into evaluation and set up monitoring mechanisms at the start of the project. For example, if you're asking landowners to call your organization, setting up a separate number for those calls is helpful for tracking. Or, if you're asking people to get management plans, make sure you can compare the number of plans requested during the campaign to a similar period before that.

Landowner behaviors that don't require direct interaction with your organization can be more difficult to track accurately. But it is usually possible to set up some monitoring systems or proxy measures to estimate behavior changes.

One technique is to ask service providers to report on landowners' behavior. For example, if you're asking landowners to plant more native species, you can ask local nurseries to report changes in sales of popular native species. If you're promoting prescribed fire, you can ask certified providers to report changes in demand for those services. This kind of data is valuable even if you work with only a subset of providers, because you're measuring change from a baseline, which tells you something about the uptick due to your campaign. It may not be the whole picture, but it's a good indicator. It's important, however, to get complete and accurate data, even if it is from a few service providers.

Another useful technique is to get landowners to report their own actions. People will do this if they are engaged with your organization, if you make it easy for them, and if you ask nicely. For example, if you tell landowners that you're tracking progress against a goal of X acres of native plantings, many people will be happy to have their planted acres counted towards that community goal. Another way to get information from landowners is to follow up with a subset of them to get a sense of what proportion have taken action.

- 3. Impact measures** assess whether the communication helped accomplish your overall conservation goals. These are measures of impact on the land.

Conservation impact can be difficult to measure because forest health changes over several years and is influenced by many factors. However, you can often access data that show the impact of your programs, especially if your program targets a limited landscape. For example, if your communication objective is to get landowners to plant and maintain riparian buffers in a watershed, you could expect to see better water quality and aquatic life in area streams. Or, if you are encouraging people to get conservation easements, total acreage of protected land in your target area would be a good impact indicator.

# Notes

# Notes

# Notes

# Notes

## Step 1: Set your Objective.

What do you want landowners to do after receiving your message?

---

---

---

---

Is your objective:

Specific?     Yes     No     Not Sure

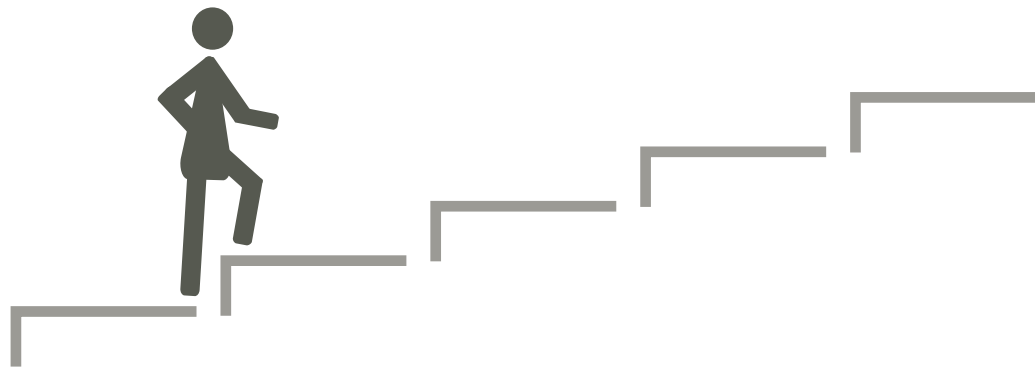
Measurable?     Yes     No     Not Sure

Attainable?     Yes     No     Not Sure

Relevant?     Yes     No     Not Sure

Time-bound?     Yes     No     Not Sure

How is this objective related to the ultimate changes you want to see? What are the various steps on your ladder of engagement? (Draw a rough picture of your ladder here.)



## Step 2: Choose an Audience Segment

Who is your primary target audience for this outreach effort? Why?

---

---

---

---

Who else do you also want to reach and influence?

---

---

---

---

## Step 3: Develop an Audience Profile

What are the most important audience attributes and themes that will guide your message development? (Write the main themes that emerged from your Stick Man brainstorming exercise.)

---

---

---

---

---

---

---

---

## Step 4: Develop Your Message

Write your Because Statement here. The format is  
[Audience X] will do [Action Y] because [compelling reason].

---

---

---

---

Write your final call to action here. This is the specific thing you will ask landowners to do.

---

---

---

---

What is the main reason why landowners will take this action?

---

---

---

---

Determine your emotional appeal. How will taking this action make audience members feel?

---

---

---

---

What are the main barriers to taking action? How will you address these in your materials?

---

---

---

What other supporting information, benefits or ideas will you present to make your message more credible, relevant or persuasive?

---

---

---

What thoughts and emotions do you want your materials to evoke and how will you do that?

---

---

---

What will you include in your message to grab the target audience's attention?

---

---

---

Take a moment to jot down any memorable phrases or visual ideas that emerged in your brainstorm. Review these later to see how well they fit with your overall message strategy.

---

---

---

## Step 5: Choose Channels

When and how will you get the message out to your target audience?

---

---

---

How effectively can your organization reach your audiences? What organizations could you partner with to increase the reach and credibility of your message?

---

---

---

---

What materials will you need? What will work best for the channels you have chosen?

---

---

---

---

## Step 6: Evaluate and Adapt

What indicators will you use to track how effectively your outreach is being implemented?

---

---

---

---

What measures will you use to track changes in landowners' behavior? When do you expect to see these changes?

---

---

---

---

What measures will you use to see if your outreach is having an impact on woodland health and other conservation goals? When would you expect to see these changes?

---

---

---

---

What main hypotheses or ideas are you testing via this outreach? What do you expect to learn about your target audience?

---

---

---

---

