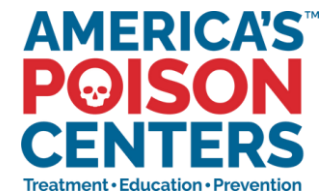


AI AS YOUR STRATEGIC PARTNER







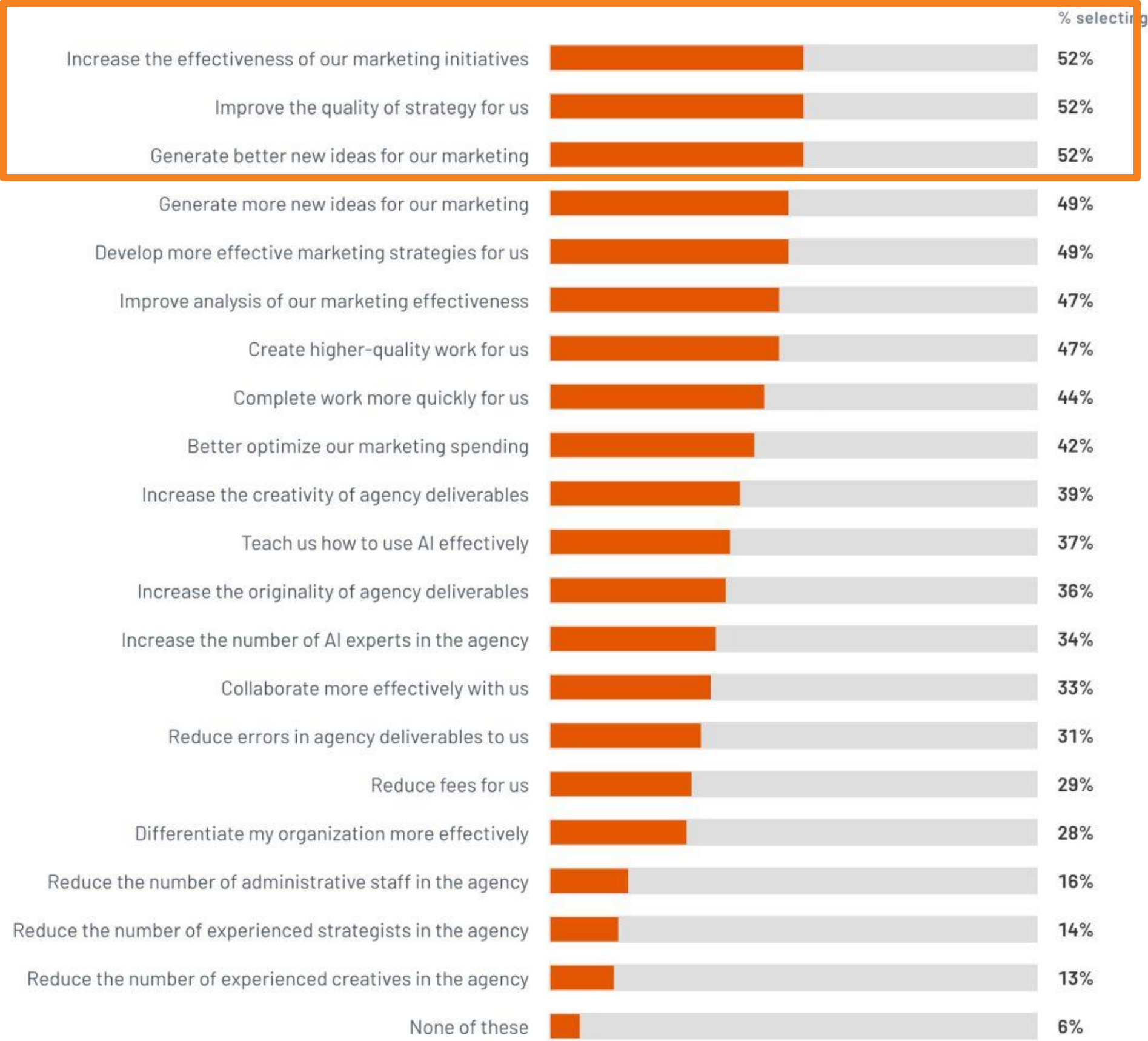
✓ Phone
✓ Computer
✓ Notebook

*Slides and resources
will be shared at the end!*

Do you expect your organization's agencies to do any of the following in the next year due to AI? Choose all that apply.

Overall

% selecting (select all that apply)

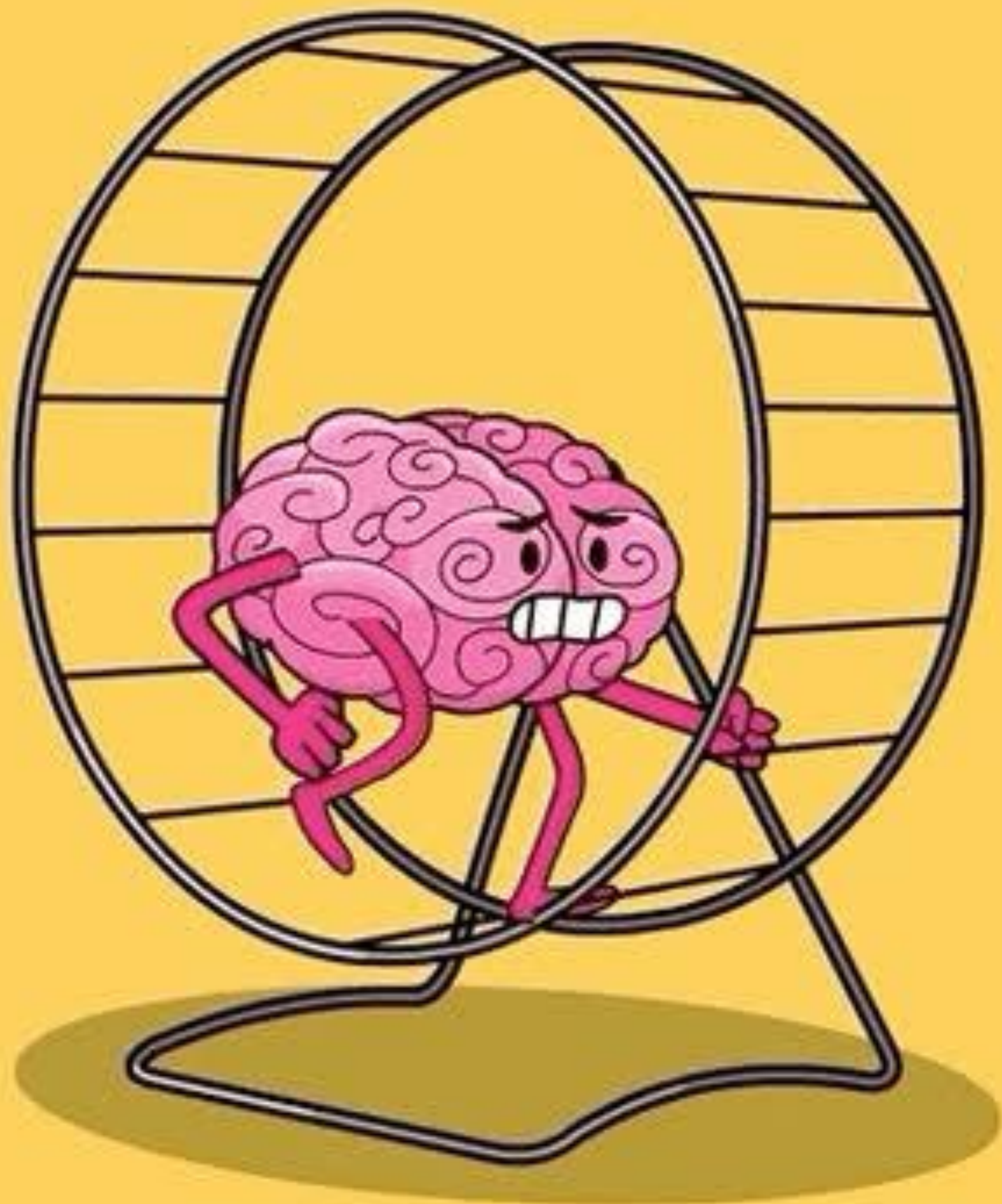


TODAY:

- ✓ Why strategy matters (and why it's hard)
- ✓ The AI opportunity
- ✓ How to actually use AI for strategy dev

**LET'S TALK
STRATEGY**







Which describes your current communication work?



Me consistently on a soapbox about strategy. Literally.

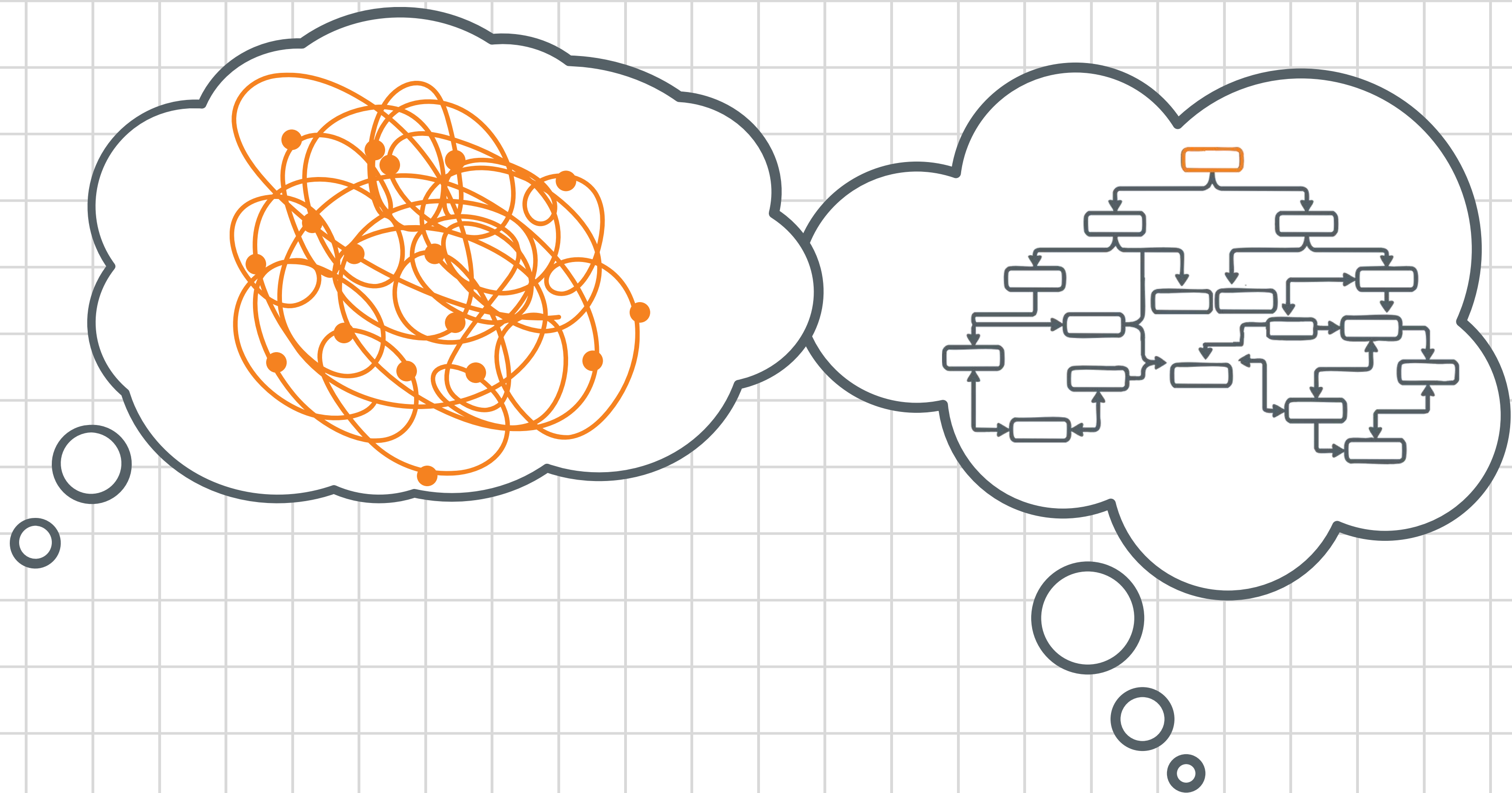
Me standing on a box of soap
(Thanks for being so literal, AI!)

**"STRATEGY WILL
MAKE EVERYTHING
MORE COMPLEX!"**

I don't have time to plan—I barely have time to execute!

My leadership just wants things done NOW. They don't *care* about strategy.

If I stop to think strategically, who's going to do the actual work?



THE COST

of tactical-only thinking:

- ✓ Wasted effort
- ✓ Inability to say no
- ✓ Leadership questioning value
- ✓ Burnout

THE VALUE

of strategic thinking:

- ✓ Clear priorities
- ✓ Measurable impact
- ✓ Leadership credibility

HOW TO KNOW

- ✓ Can you explain how this communication supports a specific goal?
- ✓ Who specifically are you trying to influence, and what do you know about them?
- ✓ What action do you want them to take after seeing this?
- ✓ How will you know if this worked?
- ✓ Why are you using THIS channel vs. another option?
- ✓ What would happen if you DIDN'T do this communication?



Which of these questions is HARDEST for you to answer about your communication?



01

Goals

What does success look like for your organization?

02

Objectives

What is a specific, measurable milestone that moves you toward your goal?

04

Strategies

A strategy is your APPROACH - how will you achieve your objective?

05

Tactics

What type of relationship does each segment of customers expect?

📈 Grow audience	💡 Build brand awareness	🎯 Advocate for issues/ changes
📈 Growth metrics (members, customers, subscribers) 📈 Financial gains (revenue, donations, savings) 💡 Reach	🎯 Participation Levels ❤️ Perception	💡 Understanding 🎯 Actions taken
👉 Create personalized experiences 🎯 Optimize path to conversion 💬 Encourage participation	👉 Nurture through comms 🏆 Demonstrate expertise through content 💬 Build community 🏆 Enforce unique methods/ USP 👉 Expand reach through broad channels	👉 Leverage partnerships 🏆 Share proof points and/or testimonials 🗣️ Create ambassador programs/efforts
Digital ads: Social Email automation Video series/shorts Podcast Website (edits, pop ups, takeover) Direct Mail Mobile app Text messaging	Blog/Articles PSA Social media organic Celebrity partnership Email news UGC Testimonials Photography Social engagement/ conversation/ collaboration	Influencers In-person events Media tour Media pitching Speaking engagements

LET'S PLAN!

START
Here

Canva Tips for
Whiteboards

How to Navigate

Lines and Shapes

Embed

Magic Shortcut

Collaborate

NEXT

Content: Pick/Edit From Here and Drag to

Goals

Objectives

Strategies

Tactics

Context

Digital Channels

Partners

Brand Media & PR

Content/Thought Leadership

Research

Experiences & Events

MARKETING PLANNING Mind Map

Sticky Notes:
Ideas/Followups

Write comments
or insights with
sticky notes

Duplicate this
sticky note or
pin it as a
keyboard
shortcut

Write comments
or insights with
sticky notes

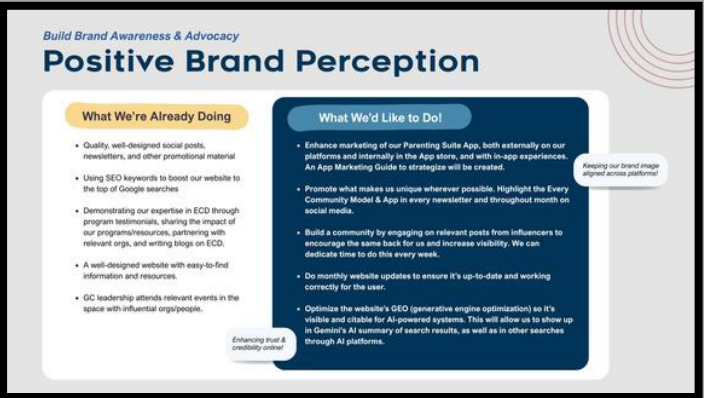
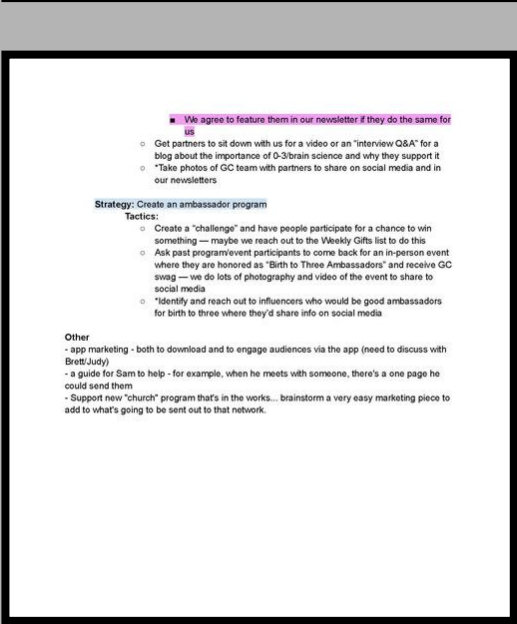
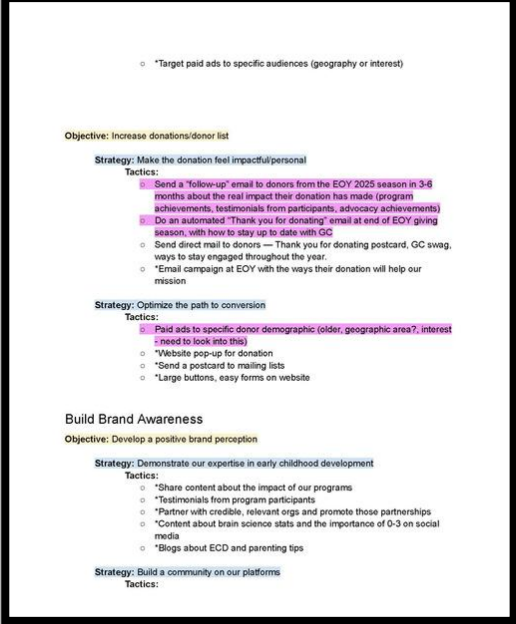
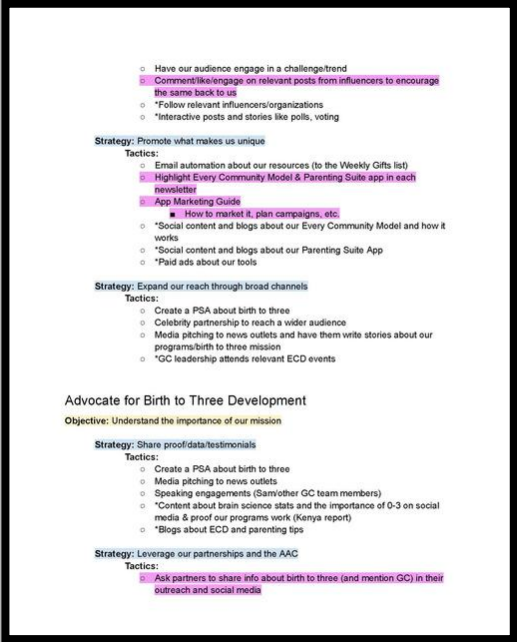
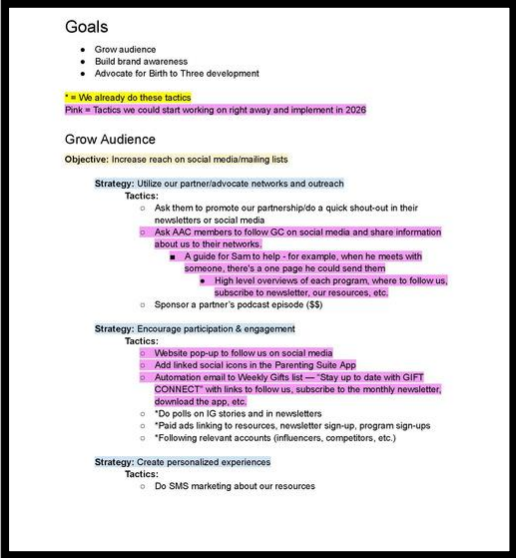
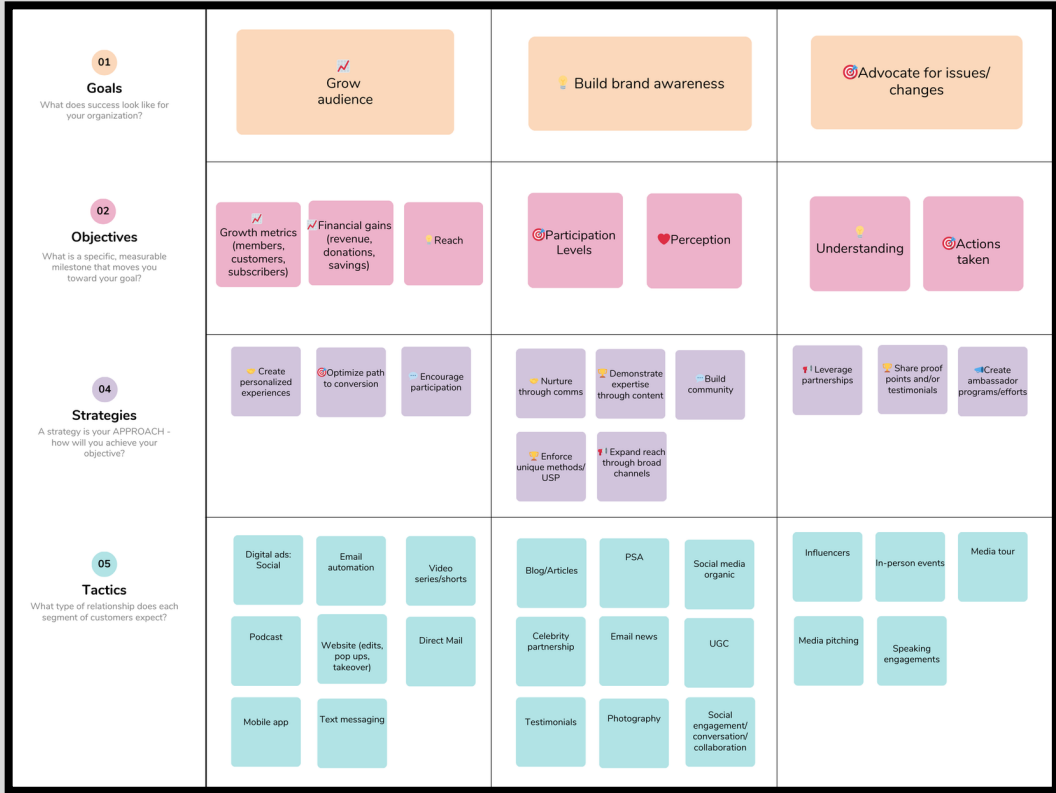
Duplicate this
sticky note or
pin it as a
keyboard
shortcut

The key is to zoom in and then scroll.

Step 1: Map it

Step 2: Outline It

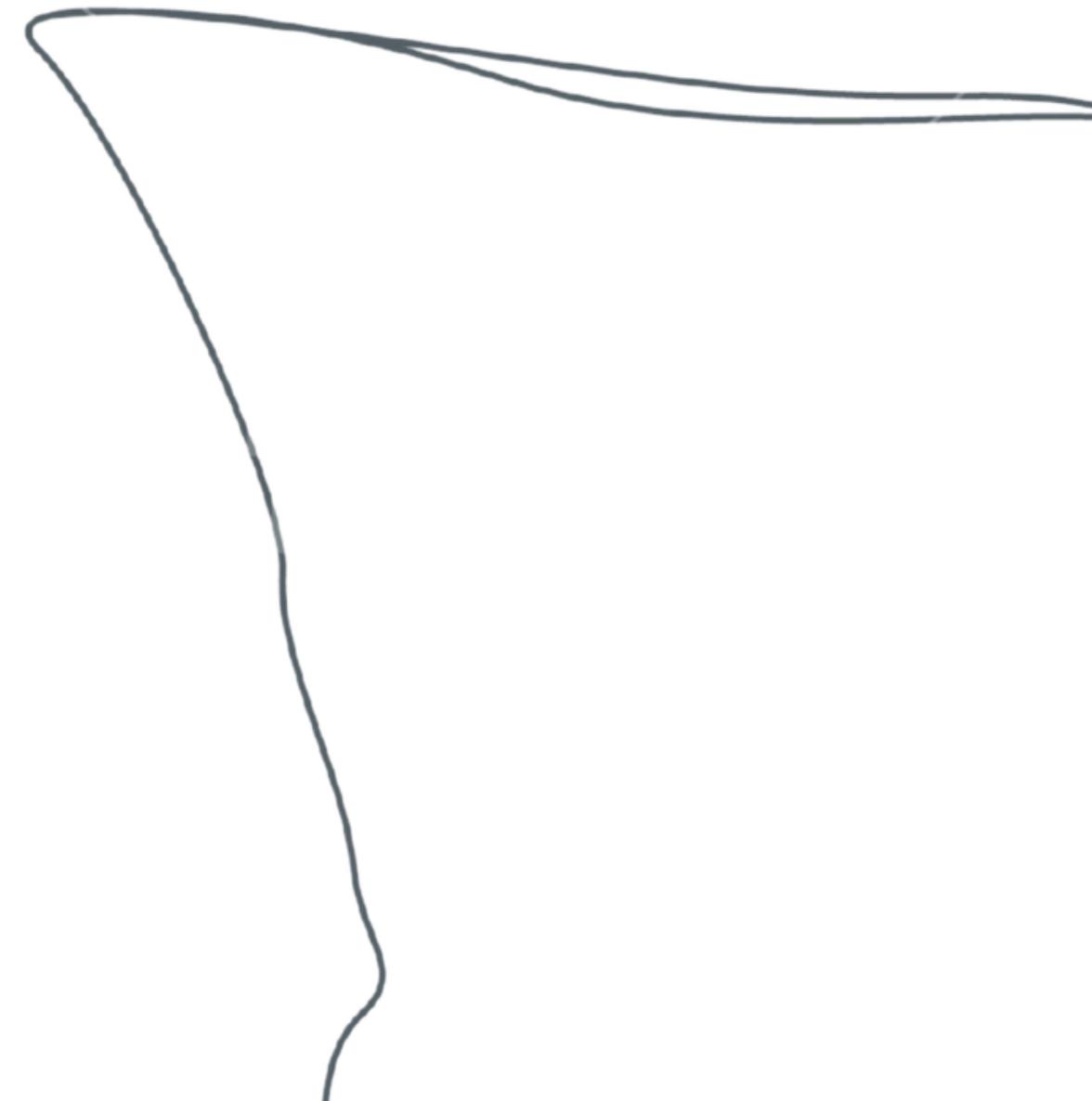
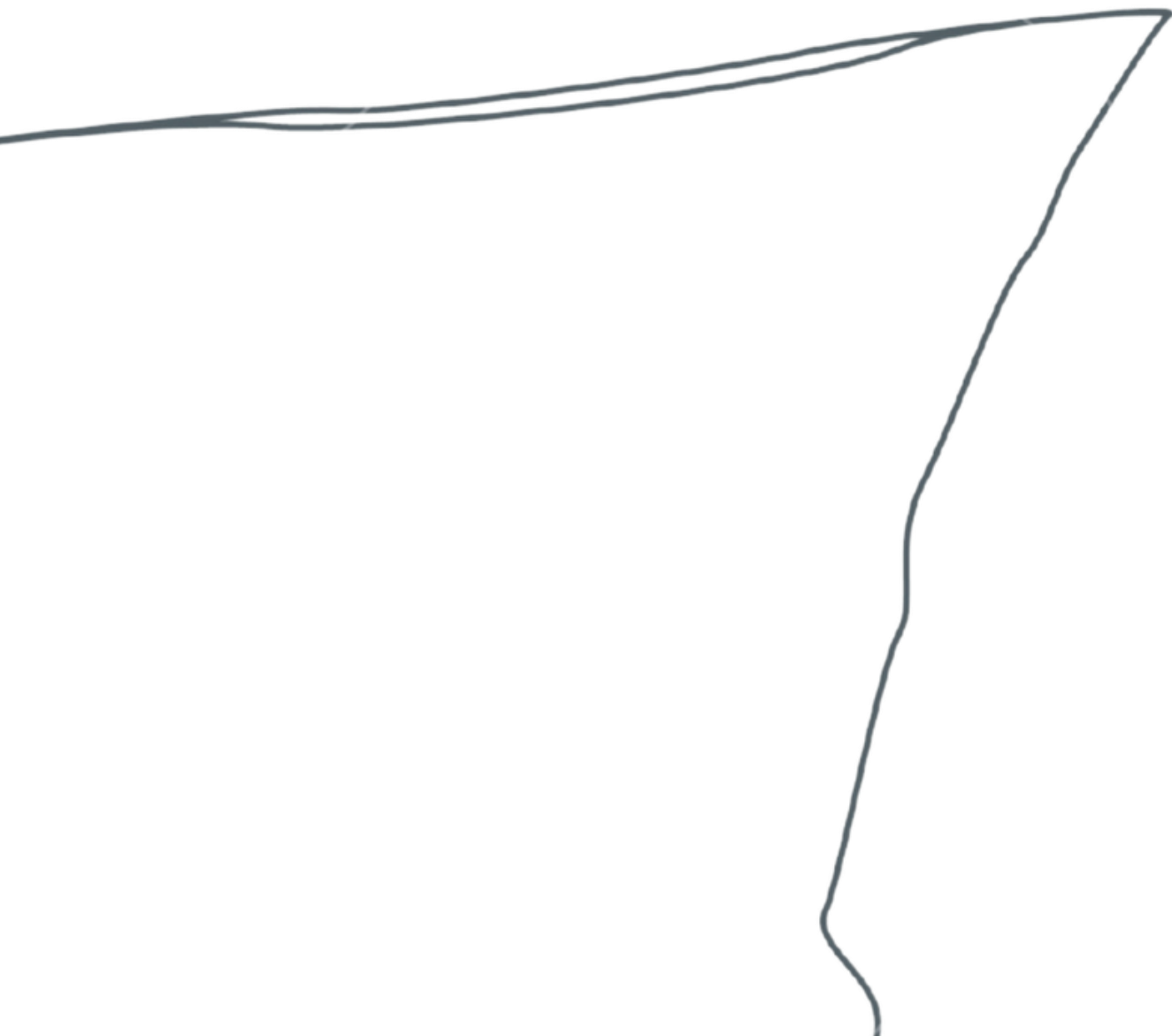
Step 3: Build it



Strategic Planning
takes TIME...



And that's exactly
where AI comes in!



AI FOR STRATEGY

AI
responded
to direct
prompts with
single
answers or
actions

Traditional AI to
Agentic AI

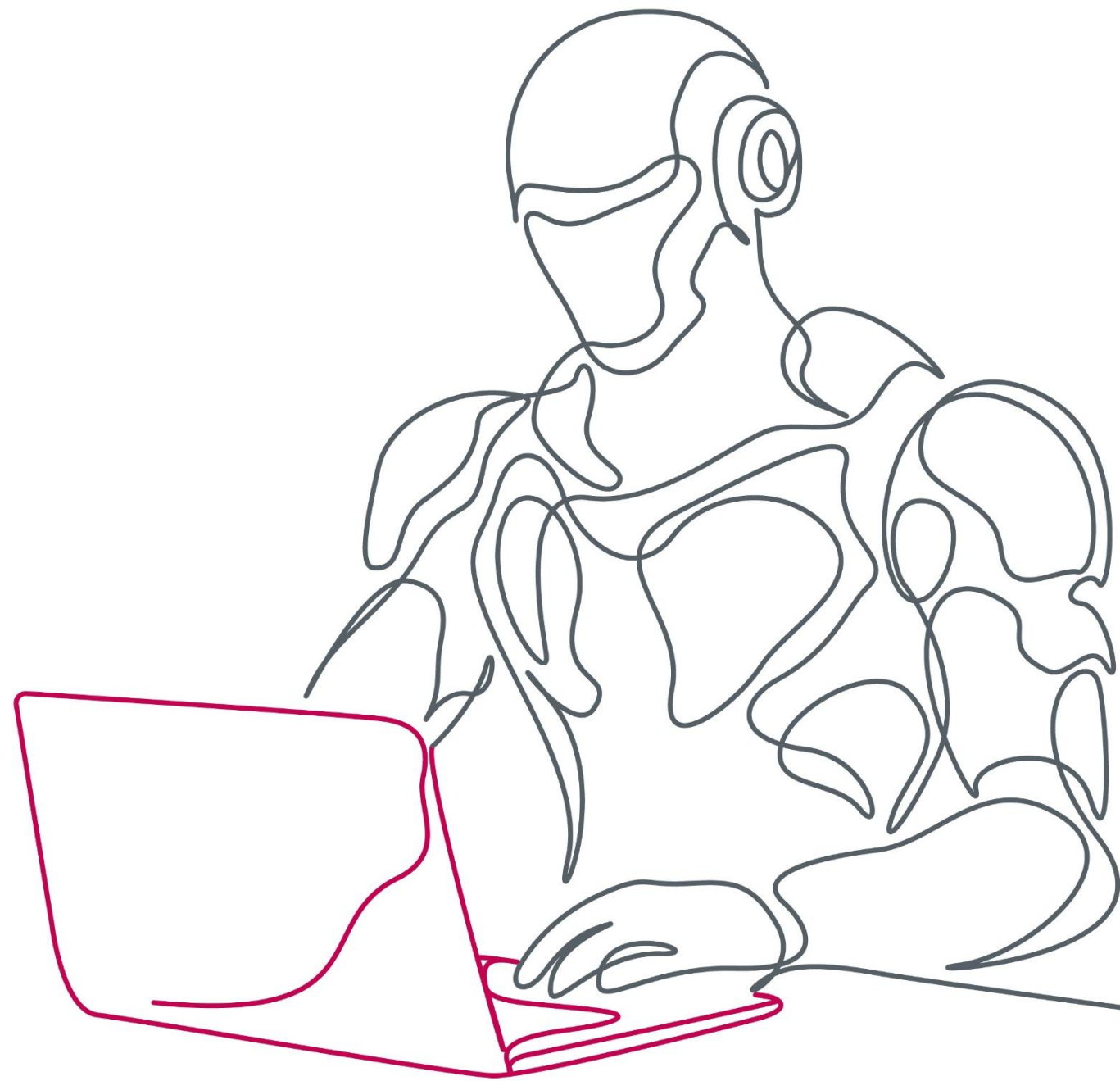
2026

AI uses
dynamic
planning
and multi-
step
execution

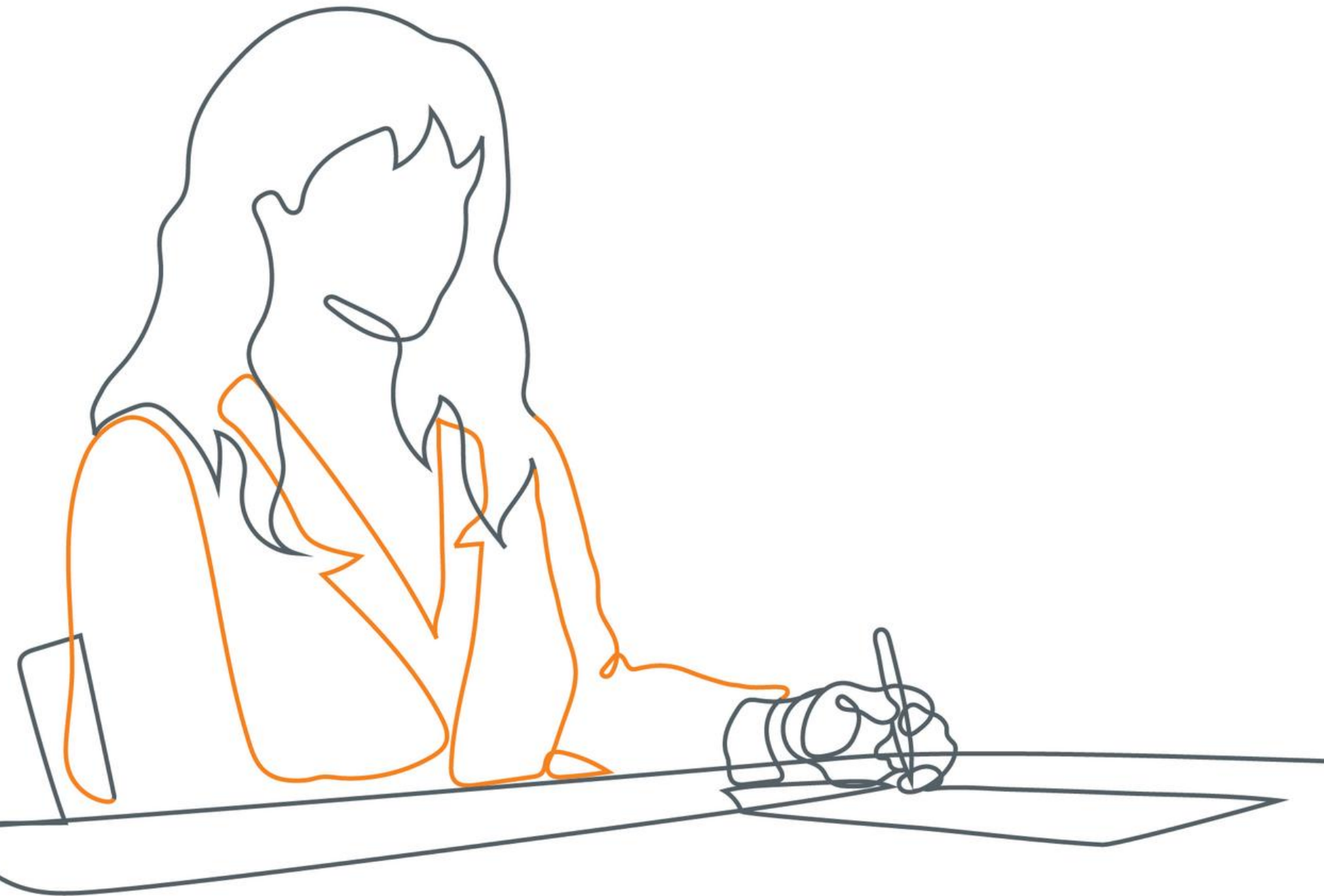
2025

AI OPPORTUNITY

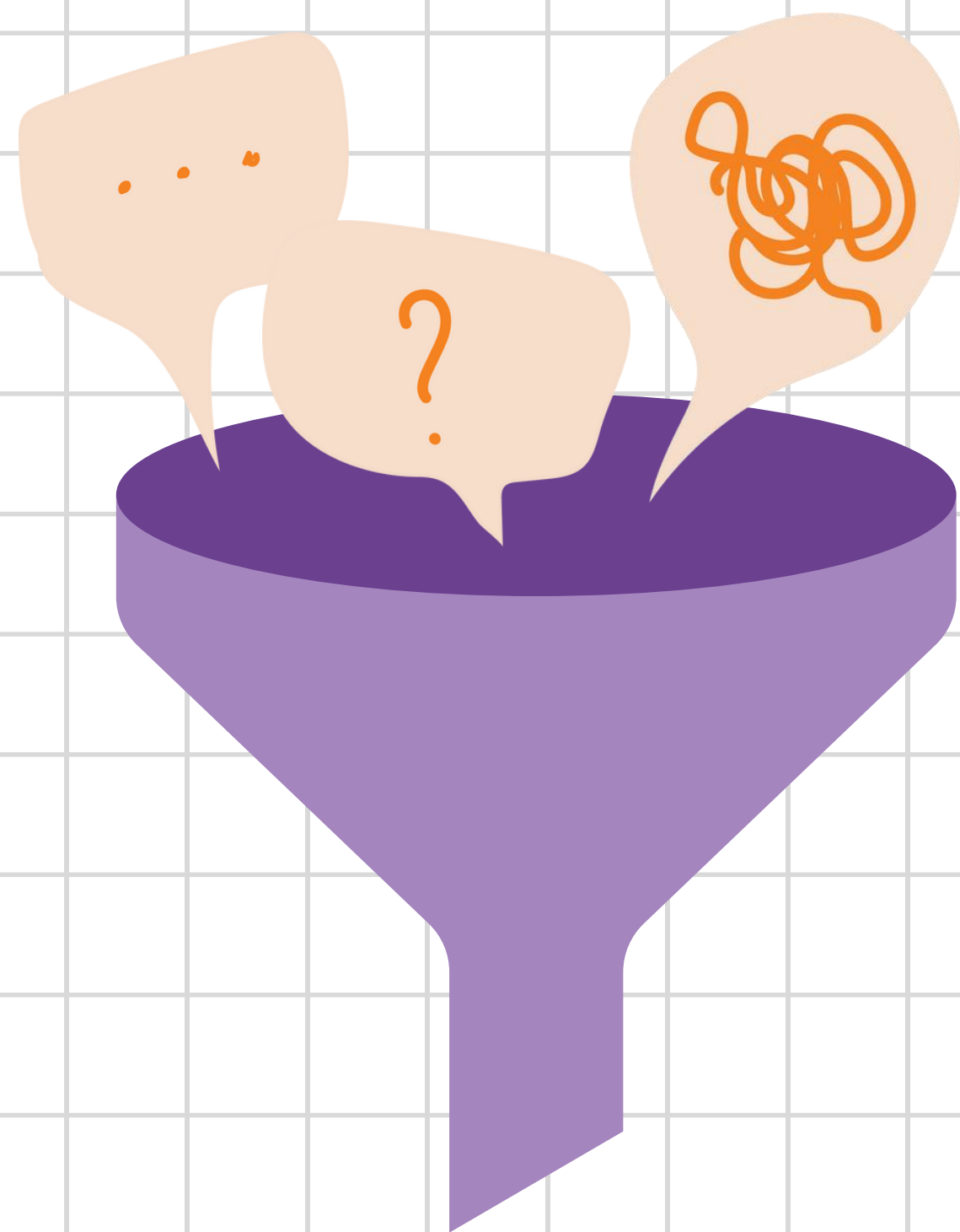
- ✓ Speed up our process/free up time
- ✓ Analyze data
- ✓ Generate options and ideas
- ✓ Challenges our assumptions
- ✓ Strategic thinking coach
- ✓ Work through scenarios and find blind spots



Research & Analysis

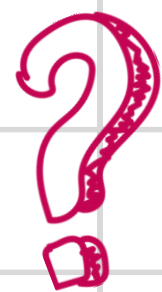


Judgment & Decisions



Input: Context,
specific direction

← AI



← Output only good as input

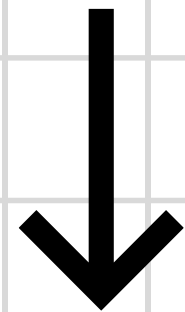




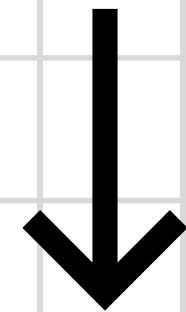
What concerns you MOST about using AI?

THE SCENARIO

The CEO walks into a staff meeting
and says: 'Nobody knows about us.
What are we going to do?'



Launch paid social media
campaigns



Think. Ask Questions.
Connect the dots in a plan.

HOT TIP 

**TALK DON'T
TYPE!**

1. ASK AI TO ASK YOU

I'm the Communications Director at a midsize nonprofit. Our stats: 12 years old, we have a workforce development focus, \$3M budget, and I work on a small team of 2 comms and marketing.

The CEO just walked into a staff meeting and said: "Nobody knows about us. We need to fix this."

I don't want to jump to a recommendation. I need to understand what the real awareness problem is first.

Can you ask me the diagnostic questions I should be answering? **Don't give me advice yet** – just ask me clarifying questions that will help us understand what we're actually trying to solve.





- Who SHOULD know about you? (Be specific about audiences)
- Do they not know you exist OR do they know you but don't understand what you do?
- Where have you been successful reaching people?
- What data do you have about awareness gaps?
- Who are you losing to competitors?
- What's your enrollment like? Are people not applying, or not finding you?
- What does your referral pipeline look like?

HOT TIP 

FEEED IT CONTEXT

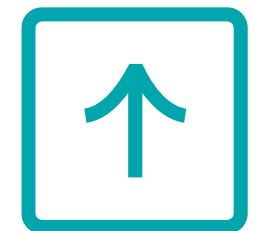
Share plans, research, documents,
press announcements, etc.

2. BRING THE ANSWERS

Great questions. Here's what I know:

- We DO have referral partnerships (social workers, school counselors know us)
- We have ZERO direct awareness in the community we serve
- Prospective participants don't know we exist – they don't know to look for us
- We DO have some older donors who've supported us for years, but zero awareness with younger donors
- There are many people who've heard of us and can't articulate what we do
- Our referral partnerships work well, but in my opinion we're leaving money on the table with direct community outreach
- Our website gets minimal traffic and our social media has 10–20 people who are interacting per post

Based on this, what do you see as the real awareness problem we need to solve? What's your diagnosis?





- You don't have a general awareness problem - you have an AUDIENCE-SPECIFIC awareness problem
- Your awareness strategy needs to be completely different for program participants vs. donors
- You're not invisible - you're in the wrong places
- The real problem: Community members who need you don't know to look for you
- Secondary problem: Even when people find you, they don't understand your value

HOT TIP 

PRESSURE. TEST

3. ARGUE AGAINST ITSELF

Okay, I like this diagnosis! We have an audience-specific awareness problem, not a general one.

But let me push back. What if I'm wrong? What if the REAL problem is that we don't have a compelling enough message?

Like, what if people DO know about us, but they don't engage because our mission isn't compelling enough?

How would you argue AGAINST your own diagnosis?

What evidence would you want to see if you were going to convince me that it's actually a messaging problem, not an awareness problem?





- If it was a messaging problem, you'd see: Higher engagement from people who DO know you, but lower conversion
- If it was messaging, your referral partners would describe you differently than you describe yourself
- If it was messaging, your website traffic would convert better (but you said it doesn't convert - suggests awareness issue)
- If it was messaging, donors would engage more than program participants - but you said the opposite
- Counter-argument is weak because your DATA supports diagnosis (awareness, not messaging)

HOT TIP 

IDENTIFY HIDDEN ASSUMPTIONS

3. FIND ASSUMPTIONS

Okay, I'm confident we're solving an audience-specific awareness problem.

But before we recommend strategy, let me identify what we're assuming:

We're assuming:

1. Community members who need us would engage if they knew about us
2. Our referral partnerships are stable and don't need growth
3. Direct outreach to community members is feasible with our current resources
4. The barrier is awareness, not access or affordability

Are these good assumptions? What other assumptions are we making that we should challenge?





- Assumption 1 is solid (supported by referral partners' success)
- Assumption 2 might be risky (what if referral partners get overwhelmed or redirect clients elsewhere?)
- Assumption 3 needs testing (do you have capacity? resources? language access?)
- Assumption 4 is mostly true but incomplete (awareness is main barrier, but access might be secondary)
- Hidden assumptions:
 - That people who know about you will self-refer
 - That your enrollment process is accessible (language, digital divide, transportation)
 - That you can reach people through their trusted channels (what ARE those?)
 - That community trust is there, even if awareness isn't

HOT TIP 

**BE CURIOUS,
NOT
CONFIDENT**

4. PUSH BACK!

Based on everything we've diagnosed, here's the strategy I'm thinking:

GOAL: Build awareness among community members who need our services

STRATEGY: Reach them through trusted intermediaries (social workers, school counselors, faith leaders) + amplify participant success stories

But here's my question: Push back on this.

What could go wrong with this strategy? Where is it weakest?

If I executed this and it failed, what would be the most likely reason?





- Weakest point: Intermediaries might be too busy or have different priorities
- Risk: Participant testimonials might feel inauthentic or invasive
- Problem: You're betting on intermediaries' goodwill without giving them tools/incentive
- Risk: You're assuming participants WANT to be public about their journey (they might not)
- Vulnerability: No clear path from "heard about us" to "enrolled" - intermediaries might not know how to refer
- Biggest risk: You're building awareness without fixing enrollment pipeline first

HOT TIP 

**ASK
WHAT IF**

5. SCENARIO MODELING

You just identified that we need to fix our enrollment pipeline before we build awareness. That makes sense.

But let me ask: What if we did it in reverse? What if we built awareness FIRST, got people interested, and THEN fixed the enrollment process?

Model that scenario for me. What would happen? What would break? And why is the sequence I'm thinking about (fix pipeline → build awareness) actually better?





- If you build awareness first: You get inbound interest → people can't figure out how to enroll → frustration → they leave → damaged reputation
- People tell their networks "confusing process, couldn't figure out how to apply"
- You waste awareness budget on people who get stuck
- vs. Fix pipeline first: You have clear, smooth enrollment → build awareness → people come in and have great experience → they refer others
- Word-of-mouth is stronger when process is seamless

HOT TIP 

REVIEW & ARTICULATE

6. DEFINE & REFINER

Alright, so our strategy is:

1. FIX enrollment pipeline first (clear, accessible process)
2. THEN build awareness through trusted intermediaries + participant stories
3. Core message: Transformation to good jobs, not just job training

Now, I want you to help me articulate this strategy clearly. Not just for my team, but for my CEO.

Can you help me define this strategy in a way that:

- Explains what we're doing
- Explains WHY we're doing it (the logic)
- Shows what SUCCESS looks like
- Addresses what the CEO is really worried about (that people don't know we exist)



Make it concise enough that I could explain this in 2 minutes to leadership.



STRATEGY: Build Community Awareness Through Trusted Pathways

WHAT WE'RE DOING:

- 1. Fix our enrollment process so it's clear and accessible
- 2. Build relationships with trusted intermediaries (social workers, counselors, faith leaders)
- 3. Amplify real participant success stories
- 4. Message: "Transform to good jobs" not "get job training"

WHY:

- Community members who need us don't know we exist (awareness problem)
- They find opportunities through trusted people in their lives, not advertising
- Our strongest asset is participant success - that's what proves we work

- Direct outreach through trusted channels is more effective than traditional awareness campaigns

SUCCESS LOOKS LIKE:

- Month 1: Enrollment process is smooth and accessible
- Month 2-3: Intermediaries trained and referring regularly
- Month 4-6: Program enrollments from direct referrals increase 30%+
- Month 6+: Participant testimonials become our awareness tool

HOT TIP 

VISUALIZE IT

6. STRATEGY TREE

Perfect. Now I want to see this entire strategy mapped visually.

Can you create a strategy tree that shows:

- GOAL at the top
- OBJECTIVES branching from goal
- STRATEGIES supporting each objective
- TACTICS supporting each strategy

Format it so I could easily convert this into a visual mind map.

Use the structure we just developed (fix pipeline → build awareness through intermediaries → amplify stories).





GOAL: Build awareness among community members who need our services

|— OBJECTIVE 1: Fix enrollment accessibility

| |— STRATEGY: Simplify access process

| | |— TACTIC: Audit current enrollment barriers

| | |— TACTIC: Create multilingual app. materials

| | |— TACTIC: Offer phone-based intake

| | |— TACTIC: Create clear "next steps" guide

| |— STRATEGY: Build trust in process

| | |— TACTIC: Create FAQ addressing common fears

| | |— TACTIC: Develop staff talking points

| | |— TACTIC: Train intake staff on welcoming tone

|— OBJECTIVE 2: Build relationships with trusted intermediaries

| |— STRATEGY: Educate intermediaries about our work

| | |— TACTIC: Create referral partner toolkit

| | |— TACTIC: Host quarterly partner check-ins

| | |— TACTIC: Develop one-pager about our programs

| | |— TACTIC: Make referral process ridiculously easy

| |— STRATEGY: Provide value back to partners

| | |— TACTIC: Share program outcomes with partners

| | |— TACTIC: Offer joint professional development

| | |— TACTIC: Feature partners in our communications

|— OBJECTIVE 3: Amplify participant success stories

| |— STRATEGY: Create participant narratives

| | |— TACTIC: Recruit participants willing to share stories

| | |— TACTIC: Video testimonials (short, authentic)

| | |— TACTIC: Written case studies with outcomes

| | |— TACTIC: Social media series from participants

| |— STRATEGY: Place stories in trusted channels

| | |— TACTIC: Share with intermediary partners

| | |— TACTIC: Feature in community partner newsletters

| | |— TACTIC: Post on platforms where target audience IS

| | |— TACTIC: Create printable materials for faith institutions

|— OBJECTIVE 4: Drive program enrollment

| |— STRATEGY: Make "next step" obvious

| | |— TACTIC: Clear call-to-action in all materials

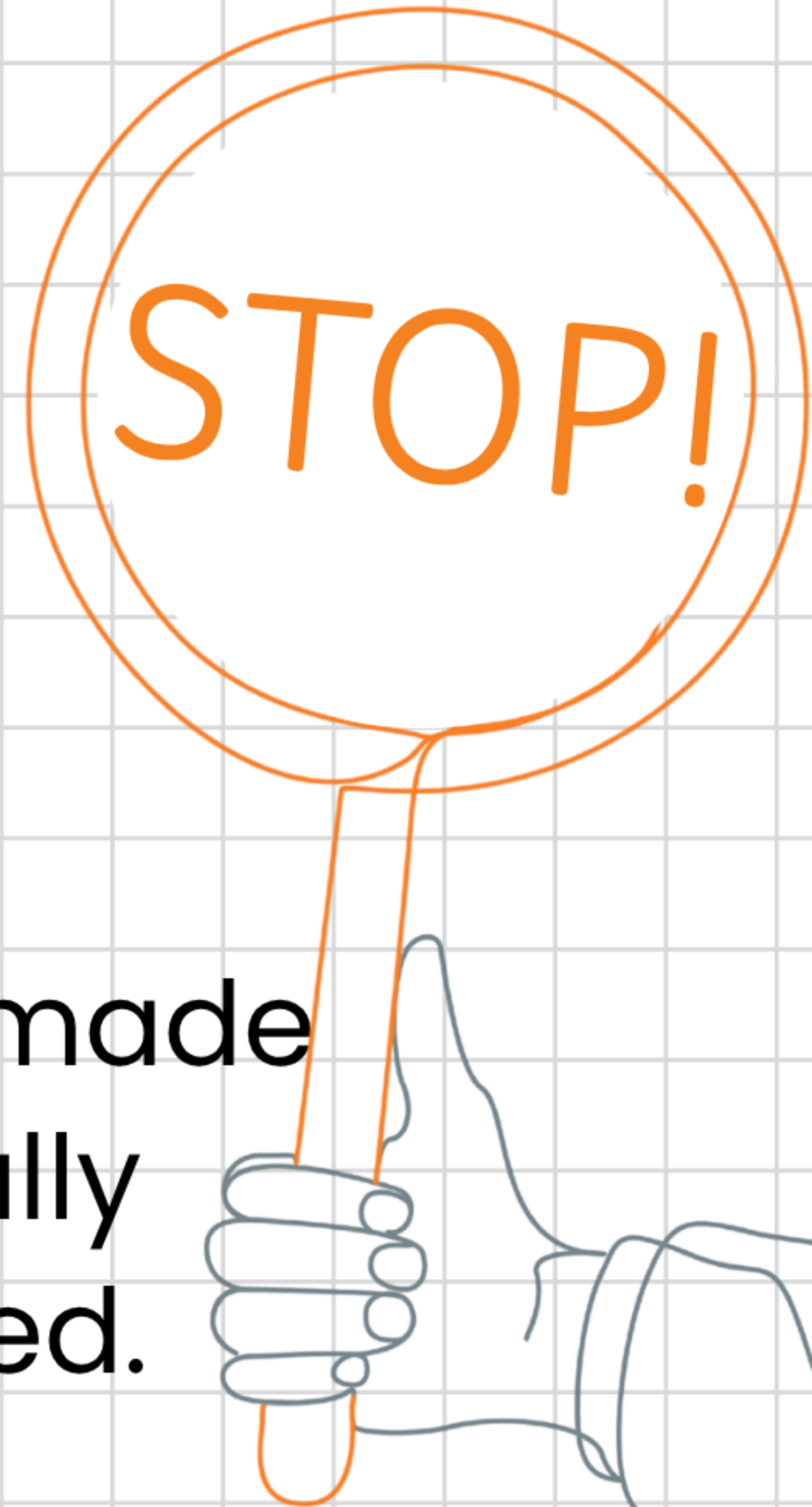
| | |— TACTIC: Remove friction (no app n fee, minimal docs)

| | |— TACTIC: Fast response time (24-hour callback)

| | |— TACTIC: Celebrate referral sources (thank publicly)

You aren't finished!

- ✓ Review the final output
 - does it work in reality?
- ✓ Is it executable?
- ✓ Dig into the assumptions made and confirm what is actually happening. Adjust if needed.



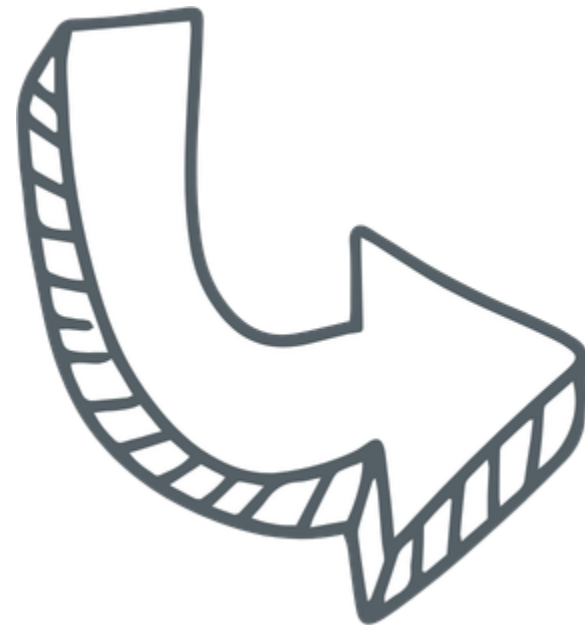
MY TOP TIPS

- ✓ Ask, don't tell first
- ✓ Don't stop at the first response – this is a conversation!
- ✓ Break your prompts into smaller questions
- ✓ Push back!
- ✓ Ask WHY and WHAT IF (test potential failures)
- ✓ **BONUS! Request alternatives**
- ✓ Model scenarios
- ✓ Ask AI to articulate where you're going and why
- ✓ Translate it into a strategy tree/graphic

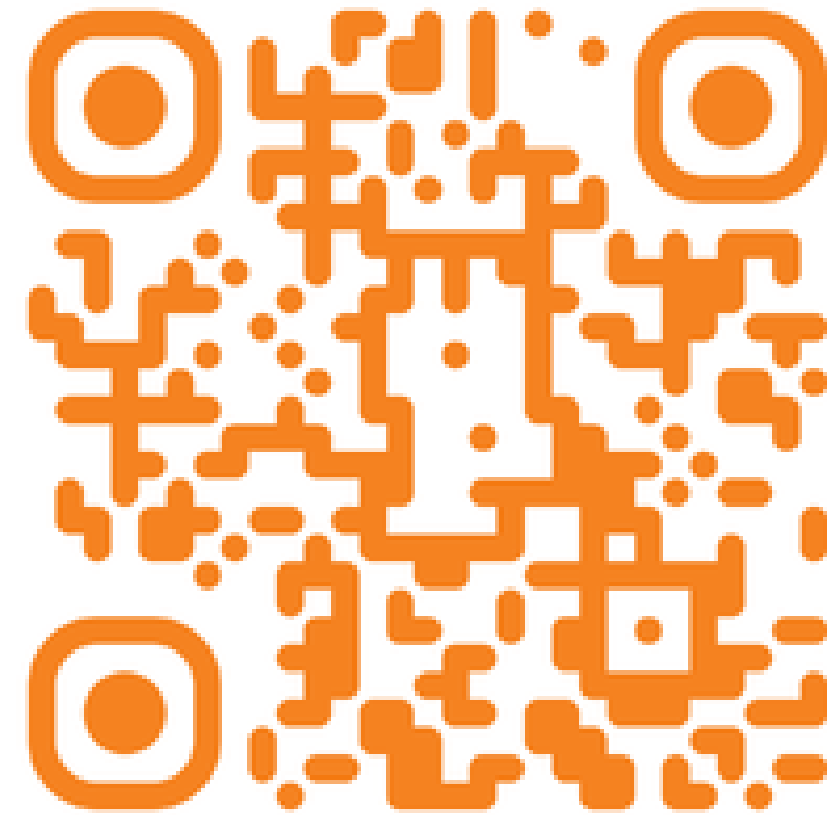
QUESTIONS



GRAB + COPY THE STRATEGY
MAP, DOWNLOAD SLIDES, SEE
OTHER RESOURCES

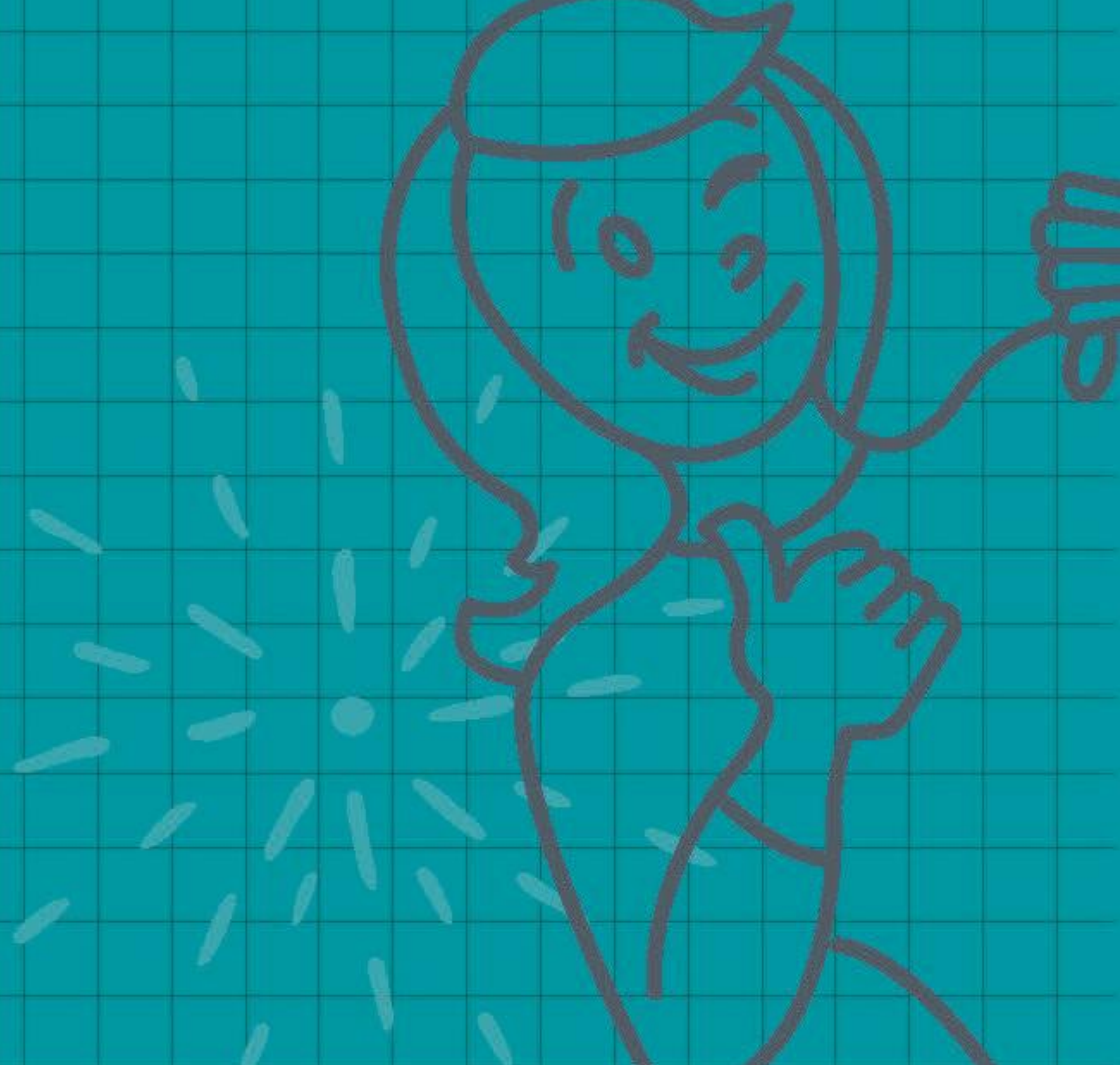


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