Corporate Anniversary Planning Worksheet

- Aligning with Business Objectives
- Connecting with Target Audiences
- Communicating Key Messages
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STOP!

BEFORE PROCEEDING ANY FURTHER IN THIS WORKBOOK, PLEASE MAKE THE FOLLOWING MINDSET ADJUSTMENTS.

THINK CREATIVITY

Corporate anniversaries are a time to say to constituents "we're not good because we're old, we're old because we're good." Resist the temptation to limit the anniversary to old-fashioned methods such as a-book-and-a-party. The more imaginative your anniversary, the more forward-looking and invigorating your message will be about the future of your organization.

THINK USEFUL

Your corporate anniversary needs to be treated as a chance to give a big shot in the arm to those objectives and programs you deem worth supporting *year-round* – driving sales, training, community relations, and so on -- and not as an expensive one-time party enjoyed one day and forgotten the next. Only by recognizing the long-term strategic value of your anniversary celebration will the organization get the most mileage from it.
Section One: The Anniversary Planning Methodology

“START WITH THE FUTURE AND WORK BACK”

An anniversary is more than a date to celebrate. It is a rare opportunity to use an organization’s success, and the values and strengths underlying that success, to connect to the future. The anniversary provides your organization the opportunity to: 1) discover a narrative that all constituencies can share as the organization embarks on its next set of business objectives; 2) strengthen confidence in the organization; 3) give context to your organization’s current goals and strategies for the future; and 4) position the anniversary as a celebration of the future.

From a planning perspective, "starting with the future and working back” means:

- Developing alignment around current business values, objectives, strengths and opportunities key to its future success

- Reviewing the company’s history and identifying elements from the past -- images, facts, legends, people, events, and firsts -- which can serve as clear and convincing evidence of those values and strengths

- Threading this history through our tried-and-true story algorithm to create a narrative that optimizes your key messages and populates these messages with substantive support.

- Designing creative, practical ways to use these stories to validate, illustrate and support the company’s hopes for the future.
Section Two: Formulating the Anniversary Masterplan

Develop an Anniversary Theme

The success of an anniversary is carried through clearly defined themes and objectives effectively communicated to target internal and external audiences. The theme is a message, which should permeate your communications program and reflect both the past and the future of your organization. The theme should also support existing advertising/communication goals whenever possible.

Develop an Anniversary Logo

In most instances, anniversary themes are incorporated into some type of logo or image. Given the large number of visual delivery systems available (advertising, PR, employee programs, publications, travelling exhibits, etc.) your anniversary logo will need to translate effectively across a wide variety of media. The logo should be easily understood by diverse audiences and be adaptable to various uses (promotional literature, letterhead, postage franking, etc.), as well as help the viewer immediately associate the good thing he/she is witnessing with the organization. Consider not including a date range ("1904-2004") on the logo as this dates the program and limits its "shelf life."

Explore a Complement of Programs

Anniversary programs can be viewed as delivery systems to targeted audiences. They should be judged for their ability to meet stated objectives; costed out in terms of time, money and other inputs; and mixed and matched according to the size and type of audience, exposure, cost and long-term benefits they would involve, individually and together.

It is important that a creative range of projects be explored in the early phase of anniversary planning. Let your imagination roam. Programs should be developed to meet multiple needs rather than responding to individual needs as they arise. A well-thought out selection of complementary projects will also have applications suitable for unforeseen opportunities.
Exploit all Available Resources and Capabilities

It is usually easier to create anniversary ideas than to pay for them all from one special budget. That is another reason why it is important to use the masterplan process to identify every opportunity possible to leverage the anniversary theme and celebration into other existing events and programs where funding is already allocated.

As the anniversary grows nearer, the demand for historical information could overwhelm your organization’s internal resources and capabilities. Don't overlook alternative sources of historical "nuggets." For instance, one of your greatest historical assets can be found in the hearts and minds of your long-term people (current and retired). Modern videotaped oral histories offers a very practical way of capturing that asset, while serving to reinforce the support and appreciation of your organization's veterans and "alumni."

Develop a Master Rollout Schedule

Once a complement of projects has been finalized, the anniversary masterplan should be used to lay out, schedule and coordinate all the anniversary inputs and outputs involved. The schedule should aim to identify complementary internal and external capabilities, by highlighting overlapping needs and activities (such as research or writing), multiple uses for historical resources (such as the many uses of oral history videotape) and ways to share the work in a practical way.
Worksheet 1: Why Celebrate Your Anniversary?

Write a 30- to 50-word paragraph that explains your current business objectives. This mission statement should answer the following questions:

What is our organization trying to achieve right now? (Growth...loyalty...productivity?)

Who are the audiences we're trying to reach? (Employees... customers... communities?)

What messages do we want to communicate to these audiences? (Stability...innovation...environmentalism?)

How do we want to recognize our milestone? (Creatively...opportunistically... aggressively?)

_________________________________________________________________________________________________________
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Worksheet 2: What are your Anniversary Goals/Objectives?

Please help establish your business priorities by ranking the following goals and objectives on an ascending scale with 1 being the most important:

- Increase Productivity
- Bolster Customer Loyalty
- Support Globalization
- Attract New Customers
- Boost Employee Retention
- Grow Revenue
- Train Employees
- Practice Good Citizenship
- Build Unity
- Other(s)

__________________________  ____
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Worksheet 3: What are your Target Audiences?

Please rank the following potential audiences on an ascending scale with 1 being the most important:

Existing Customers   ______
New Employees        ______
Retirees             ______
Shareholders         ______
Local Communities    ______
Strategic Partners   ______
Financial Analysts   ______
Industry Peers       ______
Federal, State & Local Govts. ______
Media – Local, National, Industry ______
Potential Customers  ______
Board of Directors   ______
Existing Employees   ______
Other(s)             ______
____________________   ______
____________________   ______
____________________   ______
Worksheet 4: What are your Key Messages?

Please help establish your corporate anniversary messages by rating these possible attributes of what you want to communicate using the following scale:

1—Absolutely Not
2—Maybe
3—Yes, This is a Strong Possibility
4—Definitely

Uniqueness
Stability
Maturity
Youthfulness
Innovation
Entrepreneurial Spirit
Globalization
Care & Stewardship
Independence
Pioneering
Progressive Outlook
Risk-Taking
Focus
Vision
Practicality/Frugality
Worksheet 5: Who Should Be Responsible for Your Anniversary?

Knowing your organization’s internal structure, culture and resources, where, on the following continuum, should the primary responsibility for the execution of anniversary programs be placed in order to ensure the best chance for success?

______________________________________________________________________________________________________________________________________________

Grass Roots Central Clearinghouse Top Down
(Divisional) (Corporate)

Comments:

Who are some key people who might contribute key input, experience, decision-making, and execution to your corporate anniversary masterplan?

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Worksheet 7: Program/Audience Matrix

Please indicate which of the following delivery systems might be most effective in communicating your organization’s anniversary messages to the potential target audiences (feel free to select more than one type of delivery system for each audience):

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<th>Strategic Partners</th>
<th>Employees</th>
<th>Analysts</th>
<th>Industry</th>
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Section Three: What’s Next…

If you found this exercise helpful The History Factory has tools and methodologies to build on this input to create a targeted and compelling anniversary program to drive your specific business objectives.

We're ready to hear from you! Contact Jason Dressel, Vice President of Business Development, at 703.631.0500 or via email at jdressel@historyfactory.com. You may also request corporate anniversary case studies and a full capabilities kit using our simple contact form.