**CMBell Company’s**

**Milestone or Anniversary**

**Planning Worksheet**

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| **FRAMEWORK** | **DESCRIPTION** | **EXAMPLES** |
| **DATE OF MILESTONE/ANNIVERSARY** | Indicate date of milestone, duration of celebration, and start and end dates. | Actual date of milestonePeriod of celebration (a 100-year, for example, can be celebrated throughout an entire year) |
| **MILESTONE/ANNIVERSARY DESCRIPTION** |  | Examples:100-year anniversary (or any other year)Completion of a large strategic initiativeMarket pivotLaunch of a significant new product lineAchievement of a big goal |
| **GOALS** | Pick one goal that supports your strategic business goals. Answer questions like:What do you want the result to be? How will you measure success? | Examples:Refresh the brandRepositionDeliver a visionShape cultureBuild engagement |
| **KEY MESSAGES** | Keep a future focus.Consider these questions as you shape your message:What does your current target audience think about your company?What would you like them to think?How can your message be relevant to them? | Examples:EnvironmentOutdoorsHealthCommunityFaith |
| **PLANNING TEAM** | What groups need representation on your planning committee?What executive will you report to?Who else will need to have a say in this that may not need to be on the committee—and how will you engage them?Who will chair your planning meetings?How often will you meet? | Frequent team players:Event plannerGala plannerSecurityMarketing/CommunicationsEnvironmental servicesCaterer |
| **DATES** | Review community or industry calendar to ensure nothing major is competing with any signature event you hope to hold.Review executive, board chair, and other key position calendars to secure availability, and hold those dates early. |  |
| **VENUE INVENTORY** | What current events do you have that could be flavored with your milestone message?What venues do you want to add? |  |

**Communication Plan**

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| ITEM | DESCRIPTION | AUDIENCE/USAGE | RESPONSIBILITIES | DUE BY | DATE IT APPEARS | NOTES |
| Icon |  |  |  |  |  |  |
| Print Ad |  |  |  |  |  |  |
| Pole Banners |  |  |  |  |  |  |
| Portable Banners |  |  |  |  |  |  |
| Building Banner (exterior) |  |  |  |  |  |  |
| Building Banner or Wrap (interior) |  |  |  |  |  |  |
| Elevator Wraps |  |  |  |  |  |  |
| Window Signage |  |  |  |  |  |  |
| Transit Benches |  |  |  |  |  |  |
| Transit |  |  |  |  |  |  |
| Digital Displays |  |  |  |  |  |  |
| Dedicated Web Page |  |  |  |  |  |  |
| Social Media Plan |  |  |  |  |  |  |
| History Video |  |  |  |  |  |  |
| Digital Monitor Content (internal) |  |  |  |  |  |  |
| History/Success Brochure or Book |  |  |  |  |  |  |
| Mini Videos |  |  |  |  |  |  |
| Celebration Video—History |  |  |  |  |  |  |
| Celebration Video— Achievements |  |  |  |  |  |  |
| Event 1 |  |  |  |  |  |  |
| Event 2 |  |  |  |  |  |  |
| Event 3 |  |  |  |  |  |  |
| Invitations to Event |  |  |  |  |  |  |
| Media Release |  |  |  |  |  |  |
| Story Pitch to Select Media  |  |  |  |  |  |  |
| Emails to Employees  | Provide link to landing page |  |  |  |  |  |
| Emails to Board | Provide link to landing page |  |  |  |  |  |
| Emails to Donors | Provide link to landing page |  |  |  |  |  |
| Social Media Strategy  |  |  |  |  |  |  |
| Recognition of Key Individuals | Identify significant people and method of recognition |  |  |  |  |  |
| Historical Photo  | Take a commemorative photo of all employees or founding individuals  |  |  |  |  |  |
| “Give Back” Event |  |  |  |  |  |  |
| Apparel |  |  |  |  |  |  |
| Gifts |  |  |  |  |  |  |
| Presentations | To EmployeesTo BoardTo DonorsTo ShareholdersIndustryCivic Groups |  |  |  |  |  |
| Company Vehicle Wraps |  |  |  |  |  |  |
| E-letters | Updates to employees, target audience |  |  |  |  |  |
| Sponsorships |  |  |  |  |  |  |