

Private Capital & Microenterprise (PCM) Communication & Marketing Tactics 2016 – Working Document

This plan outlines communication and marketing tactics to support achievement of the Office of Private Capital and Microenterprise’s mission:

Help solve complex development challenges by demonstrating a new model for development that leverages internal coordination, builds partnerships with private capital investors and harnesses private capital to expand the effectiveness and sustainability of USAID’s global efforts.

The plan also contributes to meeting PCM’s goals:

- Develop and support tools, approaches and intermediaries that mobilize private capital at scale to further development objectives and address gaps in sustainable finance.
- Increase uptake and adoption of PCM’s approach within USAID.
- Enhance USAID technical and thought leadership for mobilizing private capital to improve development outcomes.

This document outlines a variety of options that should be reviewed by PCM staff and then discussed during a planning meeting with KDAD to identify preferences and priorities that can be structured into a more formal plan of action. Monitoring progress and measuring performance will be essential. As PCM’s work progresses, these tactics can be further developed through separate strategies designed for targeted and more strategic efforts.

AUDIENCES

Internal

- USAID staff (DC-based)
- USAID staff (Mission/field-based)
- USAID leadership
- Communication officers (field, Agency, interagency)
- Other government representatives

External

- Current and potential private sector partners (including investors and corporate decision-makers)
- Selected U.S. Government agencies
- Host country governments and in-country private sector partners
- Selected industry media
- Other leading development agencies, institutions and funding organizations

INTERNAL OBJECTIVES

- Build institutional confidence and buy-in for PCM and demonstrate value across the Agency.
- Create awareness of PCM's technical services and innovative private sector mechanisms. Increase understanding of the role PCM plays within the Agency and how it functions in harmony with other funding entities, such as the Global Development Alliance (GDA), Development Credit Authority (DCA), Millennium Challenge Corporation (MCC), et al.
- Build capacity of Agency staff to effectively engage the private sector in investment projects and build interaction with PCM to generate private sector support for development projects and overarching goals. Identify Agency champions in DC and the field.
- Provide support that will assist PCM operate smoothly during the change of administration.
- Build recognition of the value that private capital and the private sector offers to scale up the impact of development initiatives.

EXTERNAL OBJECTIVES

- Manage and grow a network of partners. Fortify existing private sector partnerships for continued engagement and develop a mechanism for identifying potential new partners.
- Secure private sector champions (implementing partners, trade associations, advocacy groups, investors, pension funds, public and private donors, think tanks, etc.).
- Introduce USAID/PCM to private capital firms, investors and decision-makers and demonstrate and promote the financial and social impact benefits of engagement with USAID/PCM.
- Position USAID/PCM as a leader in emerging market development with private capital and business investors, donors and the development debt/finance community.
- Foster within PCM a customer service and relationship management approach that resonates with the private sector.

STRATEGIC IMPLEMENTATION

A strategic approach to implementation is critical to ensure that work is planned to address the needs of PCM while also considering timing, resources and opportunities. Tactics should build on each other over time. While structure is important, so is flexibility and responsiveness.

The following plan has two components: one that addresses short-term objectives and a second that details longer-term activities that will extend for 12 months and beyond. These components integrate priorities expressed in planning meetings and tasks identified in the PCM portion of the KDAD work plan.

Updated Priorities Based on Needs Assessment Findings

The PCM Needs Assessment provides valuable information that should be used to refine the short- and long-term tactics and approaches to reach Agency and Mission staff outlined in the PCM Communication and Marketing Tactics plan.

Some of these include:

Content

- Continue to illustrate the importance of private capital to development using compelling statistics and examples.
- Focus more attention on generating case studies since survey respondents expressed a strong interest in them.
- Seek lessons learned and communicate them.

Outreach

- Aggressively expand distribution of PCM Today to reach more domestic and international Agency staff and increase knowledge of PCM. Develop content that addresses expressed interests.
- Define what PCM wants to, or is able to, provide regarding communication and outreach to the field – not only to increase knowledge about PCM but also to communicate benefits of engagement.
- Develop a training strategy to address needs and convey PCM expertise. This could include exploring options presented by USAID University and developing a series of webinars to support the strategy.
- Provide regular content to Microlinks.

Resources

- Identify information sources that can be tapped to provide details about country-specific markets, policy and regulatory climates and opportunities to support finance mobilization. This could be an opportunity for partnership with other agencies and entities.
- Accelerate work on a knowledge management plan and a hub for information (could be MyUSAID) to meet demand for technical knowledge. Promote resources that are available.
- Develop a pipeline of webinars to share information and increase engagement among the community.
- Identify training needs and develop stand-alone or training components that can integrate with other programs.
- Capture Scopes of Work and provide samples via MyUSAID pages.

Short-Term PCM Communications Strategy

AUDIENCES

Outreach to stakeholders within USAID is a high priority to build an internal core of support for PCM, with a particular focus on the Missions. External audiences are also key during this period, but broad outreach and interaction efforts will target high-value and potential champion groups to develop over the coming months.

SHORT-TERM OBJECTIVES

- Build institutional awareness and buy-in for PCM technical services and private sector mechanisms. Motivate staff to identify opportunities for private sector investment. Increase understanding of the role PCM plays within the Agency and how it functions in harmony with other private sector engagement-focused operating units and mechanisms (e.g. DCA, Lab's CTP, etc.).
- Demonstrate PCM's progress during first year and expected future results.
- Support PCM and the outreach efforts of its staff with tools, talking points and presentations that address key topics and support PCM priority messages.
- Identify internal and external PCM champions within the Agency, as well as private and NGO sector groups.
- Increase internal and external audience engagement with PCM to identify opportunities for mobilizing private capital to enhance development and business goals.
- Build recognition of the value that private capital offers to scale up the impact of development initiatives.

STRATEGIES

- Develop a list of top PCM accomplishments/milestones and craft talking points, presentations, tools and content that draw attention to this work.
- Review and update PowerPoint presentations to include milestones and new data.
- Conduct PCM needs assessment survey, review responses, and use findings to inform training and communications activities. Findings could be socialized with the Missions during PCM's inaugural "Global PCM Conference Call" (as part of the community of practice development strategy).
- Explore a strategy for using MyUSAID and LinkedIn as platforms for PCM content to disseminate information more widely to internal and external audiences. Continue to build MyUSAID content and resources.
- Plan and promote PCM Brown Bag presentation series. Develop a pipeline of key topics based on expressed needs of stakeholders.

- Discuss options and strategies to create a general video overview presentation on PCM for use as an introduction to the office and its focus as well as acquiring soundbites and quotes for other communication products.
- Edit and produce the Mobilizing Local Capital primer.
- Plan for and conduct follow-up interviews to the PCM Needs Assessment to obtain greater detail on key topics that can be used to shape communication and training products.

Long-Term PCM Communications Strategy

The following tasks have been reorganized in this draft to more clearly illustrate support of PCM’s strategic goals.

GOAL I

Develop and support tools, approaches and intermediaries that mobilize private capital at scale.

- Use PCM assessment results to identify internal training and information needs.
- Develop a project tool to help domestic and Mission staff evaluate opportunities and gather information necessary to interact more effectively with PCM and, ultimately, private investors.
- Develop processes, examples and graphics to assist USAID staff understand when and how PCM should be engaged in project development and the tools and support services offered.
- Create and promote an online hub for all PCM content and resources. Identify opportunities to cross-post content with other outlets to build resources that support data needs.
- Review existing USAID tools to identify products that could be incorporated or modified for PCM training purposes to address the needs of staff working in the private investment sector.
- Host learning events (webinars, seminars and online discussions) to disseminate information and provide a forum for discussion and learning about private capital investment and development. Invite champions and partners to participate as experts.
- Develop a knowledge management strategy to capture and disseminate lessons learned, best practices and emerging trends, along with tools and other relevant knowledge products. This would include regular communication with key audiences and development of a central and accessible location for resources.
- Create How-to-Engage materials for internal audiences – an infographic to illustrate how PCM works and functions with other financial entities and a more detailed ‘tip sheet’ that outlines key considerations and steps.
- Curate content on MyUSAID and USAID.gov sites (consider a graphical interface like Lab’s Private Sector Engagement Toolbox).

GOAL II

Increase uptake and adoption of PCM's approach within USAID.

- Continue to host and promote a series of brown bag events. Present at USAID and other USG events that have the greatest potential to reach targeted internal audiences: all hands meetings, ESS, SMM, ALC, presentations at key bureaus and private sector engagement trainings. UPDATE: Explore ways to capture Brown Bags so they can be posted to MyUSAID for greater outreach.
- Cultivate and amplify internal champions using blogs, presentations and social media. Use platforms frequented by USAID domestic and international staff as well as other targeted audiences (e.g. Twitter, Facebook, Tibbr and Medium). Explore the use of WhatsApp. UPDATE: Given assessment responses, use of social media should be minimized.
- Increase understanding of the role PCM plays within the Agency and how it functions in harmony with other entities—GDA, DCA, MCC, etc.—through graphics, presentations and blogs.
- Create tools to ensure PCM messaging, descriptions and processes are consistent across all channels.
- Build a relationship with LPA and communicators within other offices and bureaus to disseminate the PCM message. Develop content for the USAID IMPACT blog and newsletter and solicit coverage in Frontlines. Communicate frequently through a PCM Today newsletter, Agency notices, Notes to the Field, Mission calls, DOC emails, MDs conference and consultations.
- Develop promotional materials that provide examples within development sectors. Create a repository of short case studies. Disseminate statistics that illustrate the impact of private sector investment on development.
- Use the tag line: “Mobilizing Private Capital to Improve Development Outcomes” to reinforce value of private engagement to achieve development results.
- Build a field staff promotional campaign that introduces PCM and the tools, training and services it offers.
- Plan a webinar or webinar series featuring presentations that discuss PCM engagement, services and practices. UPDATE: Develop a webinar strategy, identify a pipeline of key topics, and promote participation or post-event viewing.

GOAL III

Enhance USAID technical and thought leadership for mobilizing private capital toward development outcomes.

Communications activities focus on increasing visibility of PCM's technical and thought leadership.

- Establish a presence at high-profile internal and external events and panel discussions. Make presentations to MCC, DCA and others. Illustrate the distinct role PCM plays. Address concerns and identify viewpoints that can inform outreach tactics.

- Capture key takeaways and comments from select private sector representatives who attend the Partners Forum. Consider capturing 1-2 on video for use as an internal/external marketing tool.
- Identify communication vehicles that are go-to resources for investors and development leaders and position PCM to contribute content. Develop a relationship with select investment/finance industry media and organizations and contribute technical content on strategies, perspectives and lessons learned on the way to success. Take advantage of communications opportunities presented by Partners Forum member organizations.
- For external audiences only use of social media as part of a coordinated communication approach for external audiences to generate buzz around PCM activities. LinkedIn may be a viable option.
- Create a collection of endorsements from internal and external champions that can be used for multiple purposes from websites to presentations. Develop video takeaways in which champions share their experiences with USAID/PCM and the financial and social benefits of engagement.
- Develop a facts-based, hard-hitting PCM brochure that provides a quick summary of benefits and avenues for engagement. This should position USAID/PCM as a key go-to source for emerging market insights.
- Host an industry forum in Africa to bring together in-country governments and the private sector, Mission staff and selected private capital investors and funders to discuss trends and opportunities.
- Create promotional/outreach opportunities to engage with existing and potential private sector partners.

GOAL IV

Build PCM's operations and management structure and its organizational culture.

The following strategies can facilitate better management of PCM outreach and resources.

- . Develop a review and update process for MyUSAID and USAID.gov webpage content.
- Provide coaching and training to ensure PCM staff are at the top of their game when speaking in public, making presentations or interacting with the media.
- Use Google Analytics to track web usage (MyUSAID, USAID.gov, and LinkedIn) and topics of greatest interest to audiences.
- Build out a photo library/database to support PCM communication activities. Solicit images from projects and partners that meet PCM standards for content and quality.
- Create, if one does not already exist, a central location for all PCM materials (hard copy and electronic).
- Use Constant Contact to manage outreach to internal and external audiences.
- Create templates for a wide variety of collateral to speed development and dissemination of information while maintaining PCM's brand

MESSAGE BUILDOUT

Working from Ogilvy's message triangles, additional message points are necessary to add depth and details about PCM and its approach.

Internal Messages

- USAID's private sector engagement is not new, but PCM is taking it to a new level by targeting private capital investors who have the potential to become partners in emerging market projects to accelerate and scale up development programs to reach more people.
- PCM is a service center providing technical expertise, private investor insights and tools to assist USAID project developers work successfully with the private sector and generate funding for development priorities.
- PCM does not duplicate the work of other mechanisms but instead complements existing structures to offer a well-rounded suite of project funding options.
- PCM's methods are fully endorsed by USAID and are not in conflict with USAID rules and regulations.
- Private sector investment is a proven strategy to advance development initiatives.
- The investment capacity of the private sector far outpaces official development funding. Engaging private capital investors makes sense, as it creates a win/win situation.

External Messages

- USAID is a smart choice for investors wanting to participate in emerging markets as the Agency blends innovation and opportunity.
- PCM is the right point of contact for engaging with USAID, due to its expertise and ability to coordinate across government entities.
- PCM staff are experienced experts. They are fluent in the languages of business and social impact and have on-the-ground experience. They can help transform development projects into investment opportunities.
- USAID has the access and convening power to bring multiple partners to the table to explore and evaluate opportunities.
- Working with PCM provides connections to other private investors, industry leaders and organizations that are transforming the developing world.
- Through PCM, private investors can extend the impact of their work.
- PCM can reduce the risk for investors and the transaction costs associated with projects.
- USAID's experience and reputation make it a trusted partner/broker. The Agency can help investors maintain integrity and sound business practices.

- Partnership with USAID/PCM gives investors an opportunity to explore profitable deals and participate in making the world a better place, a benefit that resonates with clients and consumers.