Temple Shalom Board of Trustees
Special Board Meeting via Zoom
Tuesday, August 8, 2023 at 7:00 p.m.

Present:

Dennis Eichelbaum, President	X	Lory Kohleriter	X	Alice Rosen, Sisterhood President	X
Theresa Myers, EVP	X	Barry Lachman	X	Louis Marx, Bro President	
Terry Abel, VP	X	Stuart Marcus	X	Rabbi Andrew Paley	
Stephanie Hirsh, VP	X	Gretchen Reynolds	X	David Lamden, Executive Dir.	X
Joel Guskin, Finance Dir.	X	Ali Rhodes	X	Barry Epstein	X
Laurel Fisher, Secretary		Renee Roth	X	Paddy Epstein	X
Gail Enda, Treasurer		Stephanie Russell	X	James Darling, Brotherhood	X
Debra Levy-Fritts, Past President	X	Ryan Schamerloh	X	Laney Arndt, Sisterhood	X
Barry Brown	X	Mollie Schick	X	Diane Laner, Communications Chair	X
Emma Darling		Bill Siegel	X	Katie Hunt, Heart Wise Consulting	X
David Gerber		Karen Stock	X	Whitney Donaldson, Heart Wise Consulting	X
Rik Heller		Steve Weintraub		Lindsey Giovanni, Heart Wise Consulting	X

Heart Wise Consulting gave the below presentation.

A Q&A followed the presentation. The full Strategy Plan is available to the Board for review. There is a lot of information that was presented to be considered. Future discussions will take place.

Meeting adjourned at 8:16 p.m.

PREPARED BY HEART WISE CONSULTING FOR TEMPLE SHALOM DALLAS

Strengthening Temple Shalom's Community

Communications strategy to drive integrated and meaningful content + engagement among both members and prospects.

PRESENTATION TO BOARD OF TRUSTEES

July 21, 2023

WHY WE'RE HERE
The Challenge

In many ways, Temple Shalom's strengths are also its challenges. Temple subsists on the incredible passion and dedication of its lay leaders and volunteers working alongside a talented yet overstretched staff that executes a vast amount of communication, among other responsibilities.

While this "from the ground up" sensibility offers many assets, it has also led to pitfalls, including the lack of a concrete and centralized communications strategy to drive processes, guidelines, and coordination.

Members do not always feel in the know or understand where to get the information they need. Some are overwhelmed. Potential prospects likely struggle to find information that feels relevant to them or that powerfully tells the Temple Shalom "story." The result is an inability to make decisions, feel connected, become engaged and stay engaged.

WHERE WE'RE HEADED
The Goal

As a result, it is imperative that Temple Shalom creates:

- Internal process and guidelines for better coordination among staff and volunteers to ensure timeliness, organization, and consistency;

- Clear, organized and compelling outward communications that build a stronger sense of engagement, confidence and ultimately, belonging in a community among existing members and prospects.

   The goal? Members and prospects getting the information they want and need so a stronger sense of community is built and a higher level of engagement is attained.

# WHERE TEMPLE SHALOM CAN GO
The Opportunities

Temple Shalom's personality is warm, intimate, and inviting. Its smaller scale creates a felt sense of a close-knit family (among both members *and* staff), driven by tight bonds, passion, commitment and service. A sense of community is alive and palpable.

Temple has an opportunity to create an even stronger sense of this familial community and belonging by amplifying this extended family member/neighbor next door sensibility in your communications.

THE POWER OF A BRAND ARCHETYPE

Archetypes bring to life twelve different personalities based on human psychology. These archetypes help to encompass your brand's overall personality and work as a mental shortcut to help teams create consistent, engaging messaging and content.
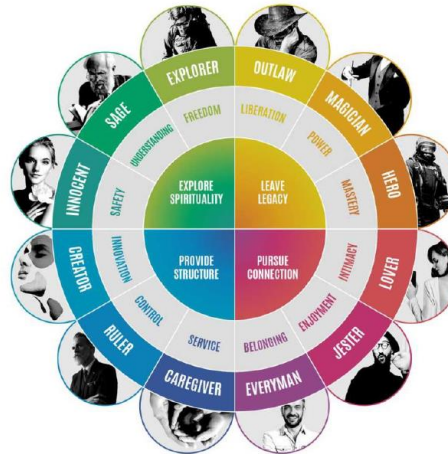
TEMPLE SHALOM & THE POWER OF THE BRAND ARCHETYPE

Temple Shalom has an opportunity to connect with their audiences in a deep and meaningful way–transforming communications from functional words to relationship builders.

Temple most embodies the **everyperson archetype** who is **driven by a need to create belonging**, and who is familiar, honest and friendly. **They believe that everyone matters equally** and aims to be neighborly and helpful. The everyperson motivates others to do their best and to pitch in to solve problems.

THE "EVERYPERSON"

As the "Everyperson" how does Temple Shalom show up? How do they sound?

PERSONALITY
Humble · Unpretentious · Dependable
Reliable · Stable · Trustworthy
Familiar · Down-to-earth · Honest
People-oriented · Practical · Relatable
Understanding · Ordinary · Friendly
Outgoing · Connected · Genuine
Likeable · Welcoming · Sincere

TONE OF VOICE
Empathetic · Grounding · Connective
Honest · Welcoming

THE ARCHETYPE & TEMPLE SHALOM'S COMMUNICATION PILLARS

Alongside Temple's core values of community, volunteerism, social justice and lifelong learning, the Everyperson can also drive the Blueprint 2025 vision around creating meaningful:

- Community and connections
- Experiences to build a world of justice, wholeness and peace
- Worship experiences

We have distilled these areas of focus into key communication pillars, which can function to organize comms content, address needs, and provide meaningful benefits to members.

Worship

Tikkun Olam

Belonging

Learning
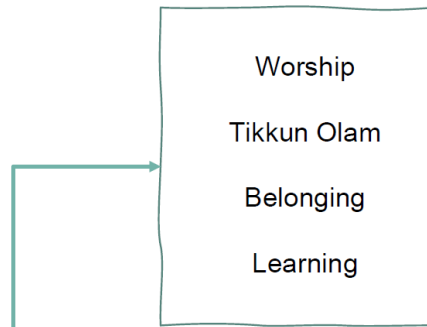
STRATEGIC COMMUNICATION IMPERATIVES

As the "everyperson," how do you transform from functional words to relationship builders?

1	2	3
Organize content and communication by pillars to more meaningfully address people's needs.	**Speak** with a relatable, personable human voice that is clear and targeted.	**Create** visual consistency that, like the voice, is relatable and focuses on people/community of Temple.

Internal Communications Recommendation

INTERNAL OPPORTUNITIES TO PURSUE

STEP 1 — Organize teams and establish comms responsibilities and processes.

STEP 2 — Align on foundational brand strategy, including pillars to structure content and drive messaging & deliverables.

STEP 3 — Align on best practices for each type of content and channel.

STEP 4 — Update website to modern, mobile-friendly platform to serve as the anchor for communications.

STEP 1 | RECONFIGURE TEAM RESPONSIBILITIES AND PROCESSES

CREATE A COMMUNICATIONS TEAM

Round out a centralized comms team that manages planning and execution of all Temple Shalom comms, spanning all councils, groups, and programs.

Coordinator of Communication:
Will serve as the authority over all outgoing information and contribute to consistency, accuracy, visual impact, and member engagement with content.

Communication team members:
- Marketing Lead
- Technology Lead
- Socials Lead
- Brotherhood Communications Rep
- Sisterhood Communications Rep

To Do: Determine how appropriate councils and auxiliaries are represented on team.

IMPLEMENT NEW PROCESSES & SYSTEMS

Build consistent tools, resources, and points of collaboration that will serve not only the communications team, but volunteers and wider membership, and will have:

Regularly scheduled meetings
Foster collaboration by promoting shared resources and membership goals as well as aligned messaging & pillars.

A clear internal calendaring system
Identify, assign, and follow through with the communication tasks determined at Comms Meetings.

Program and event planning processes
Streamline current processes and centralize critical decisions regarding events.

To Do: Review recommended processes. Set up new technology systems.

STEP 1 | EXAMPLE – TEAM MEETINGS

Comms Team Meeting Agendas & Goals

1st and 3rd Monday of every month

Team PLANNING meeting: Make the Plan (1st Monday)
- Build out communications plan on internal comms calendar, looking ahead 30 - 60 days.
- Events are to include all programs, holidays, councils, groups.

Team SYNC meeting: Review the Plan (3rd Monday)
- Review upcoming months comms schedule and make adjustments.
- Monitor channel & vehicle KPI's, making adjustments if needed.

All events and planned communication dates are to be scheduled on the Internal Communications Planning Calendar.

PROPOSED AGENDA
Program & Events discussion to occurs at every meeting

CORE VALUES
Alignment, reviewing developed content, needed language adjustments

UPDATE
Program & events in progress

NEW
Program & events proposals team review

ATTRACT
How to target young families/ new members

RETAIN
Programs fulfilling needs for all avatars

STEP 1 | EXAMPLE – COMMUNICATIONS PLANNING CALENDAR

Keeping track of communications team planning and execution dates and milestones in one centralized place.

STEP 2 | ALIGN ON BRAND STRATEGY FOR MESSAGING FOUNDATION

"WORKSHOP" COMMUNICATION PILLARS

These four pillars are an initial attempt at consolidating the core aspects of Temple Shalom that draw members in.
- Worship
- Tikkun Olam
- Belonging
- Learning

For communications, these pillars can serve as the foundation for organization and content creation that appeals to members and prospects in lieu of a larger brand strategy.

To Do: Gain internal consensus on core communication pillars

BUILD A FOUNDATION FOR COMMUNICATIONS THROUGH BRAND STRATEGY

Brand foundation.
Build on the core of Temple Shalom – Mission, Vision, Values - to establish the **brand foundation**

Brand messaging
Determine **core brand messaging** – how the brand comes to life in positioning & differentiation, pillars, & personality

Visual identity Guide
Create cohesive **visual identity** that represents the Temple Shalom brand and messaging – adapted across all media channels through elements, templates, and typography

To Do: Outsource brand work including brand strategy, messaging playbook, and visual brand identity

STEP 3 | ALIGN ON NEW CONTENT & CURRENT CHANNEL BEST PRACTICE

IMPLEMENT BEST PRACTICES ACROSS HIGH IMPACT TOUCHPOINTS.

Using the most impactful touchpoints that reach the entire congregation, it's important to start consistently implementing best practices.

Website
Example: use the right type of content in the right places (evergreen/constant v. time-sensitive).

Emails
Example: use precise subject lines to engage readers.

Newsletter
Example: organize info and improve layout for readability.

To Do: Review best practices and channel strategies.

IDENTIFY PRIORITY TACTICS AND EXECUTE VIA BEST PRACTICES.

For the most important types of content that Temple needs to share in multiple channels, the team should identify which tactics (i.e., channels and vehicles) are the ones to tackle first.

Events
Example: feature events on website blog, event calendar, & social.

Programming Information
Example: keep key program details on dedicated web pages and in print brochure.

At a glance / timely updates
Example: adapt to emails, blog, and announcement bar.

To Do: Zero in on priority tactics to execute for each content type.

STEP 3 | EXAMPLE – HOW DIFFERENT CONTENT CATEGORIES LIVE IN THE COMMS ECOSYSTEM (DETERMINE WHERE THEY ARE BEST SUITED)

CONTENT CATEGORY	EXAMPLES	TYPE	WEBSITE LOCATION	ADDITIONAL CHANNEL / VEHICLE PLACEMENT
General Temple Information	Temple Story	Evergreen, Constant	Homepage, About Us	Printed brochure
Programs	Program description (what value we serve and who we are)	Evergreen, Constant	Program details page	Brochure, flier
Event details	Specific program	Time/date specific	Online events calendar, Blog	Social, flier, email (RSVPs)
Announcement	New Executive Director, Letter from Rabbi, Temple security update.	Good to know, exciting, and informative	Blog & website homepage announcement bar (if appropriate)	Social, Email, Text (pending details & urgency)
Month / week at a glance	Newsletter, Weekly email	Time/date specific	Newsletters archive page; utilizes other page/post links	Email, Printed flier
Lifestage	Birth, death, marriages	Time sensitive, emotionally sensitive, respectful delivery	TBD	Email, Newsletter

STEP 4 | PREPARE FOR WEBSITE UPDATE

CREATE MODERN WEBSITE THAT PROVIDES A POSITIVE USER EXPERIENCE.

A new website will provide current members and prospects with the information they need to engage with Temple and/or participate in its' programs and events.

We recommend moving away from URJ, pending further research. The website should be built to optimize three key types of content:
- Evergreen content that will never change (About Temple, program information, etc.)
- Time-sensitive content (event and holiday information)
- Calendar that brings together Temple-wide events

While research occurs, it is possible to do a quick clean up of existing content, e.g. deleting extensive drop-down menu info.

To Do: Clean up existing website for short-term and Identify web development team to rebuild the website.

GENERATE WEBSITE FEATURE RECOMMENDATIONS.

The communications team should collaborate on a list of website requirements that can optimize current content in an up-to date format:

Technology requirements
- Mobile friendly platform
- User friendly calendar integration with RSVP functionality
- Reduced loading times
- User-friendly front and back-end experience

Membership-centered requirements
- Organized by pillars/benefits
- Pathways for prospective and current members
- Donation/pay feature

To Do: Create prioritized requirements list with input from staff, volunteers & members.

RECAP ON OPPORTUNITIES AND WHAT'S NEXT

STEP 1 Reconfigure team responsibilities and processes.
→ Recruit for paid or volunteer positions. Review recommended process. Set up technology systems.

STEP 2 Align on brand strategy for messaging foundation.
→ Gain internal consensus on core pillars. Outsource brand work including brand strategy, messaging playbook, and visual brand identity.

STEP 3 Align on new content and channel best practices.
→ Review best practices and channel strategies. Zero in on priority tactics for each content type.

STEP 4 Update website to modern, mobile-friendly platform to serve as the anchor for communications.
→ Clean up existing content. Identify web development team to rebuild the website. Create prioritized requirements list.
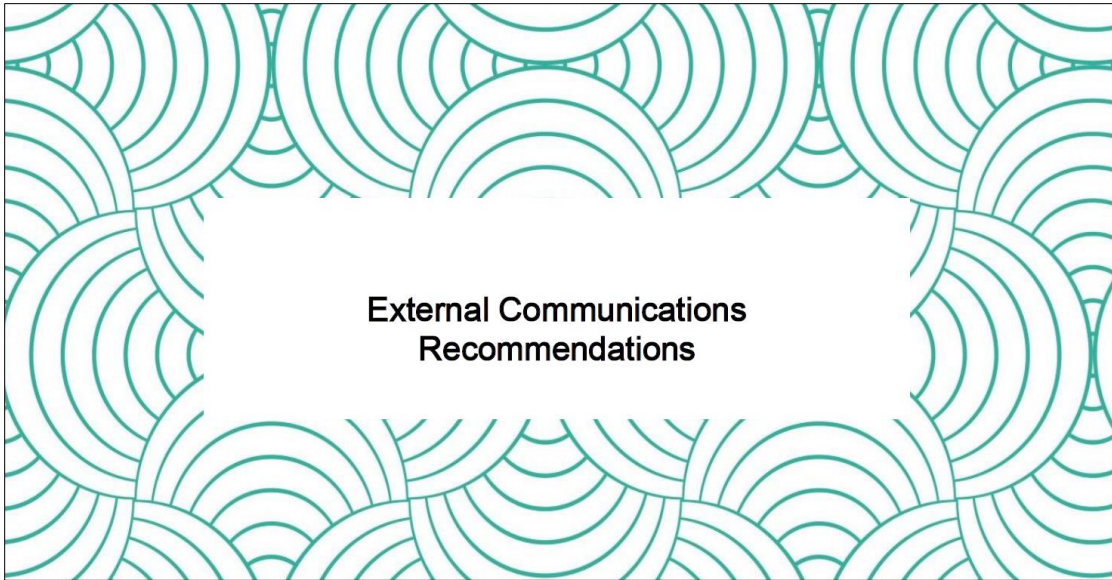
External Communications
Recommendations

EXTERNAL OPPORTUNITIES TO PURSUE

STEP 1	Create content pieces using pillars.

STEP 2	Disseminate pillar-based content to audiences via relevant channels.

A	Optimize and maintain high-impact congregation-wide communications (website, newsletter, emails, calendar).
B	Implement best practices for additional channels.

STEP 3	Develop new marketing initiatives that maximize newly-created communication to more directly target prospects.

STEP 1 | CREATE CONTENT PIECES USING PILLARS

ASK GUIDING QUESTIONS TO SHAPE CONTENT

With each piece of content to communicate, guiding questions should be asked to determine what it's intended to do. *What is the action that people should take around this event/initiative/program that you want to communicate?*

Worship *Attend/watch a service? Participate in holiday celebration?*

Tikkun Olam *Participate in events/opportunities that contribute to bettering the world?*

Belonging *RSVP to community events that connect to temple family?*

Learning *Join an adult education seminar?*

To Do: Use questions to identify which events/ programs align with pillars; reinforce in reviews, meetings, and in feedback

APPLY PILLARS TO COMMUNICATE BENEFITS

Identifying which pillar is the lead in each event/initiative/ program serves as a starting place to bring content to life and to connect to members, current and new.

Worship Building a spiritual practice, spiritual health, spiritual growth, connection to God.

Tikkun Olam Put faith into action, find purpose, improve the world, promote social justice through understanding.

Belonging Social support, connect with like-minded people, acceptance, socializing & building relationships.

Learning Preserve culture & tradition, promote peace & understanding, deeper knowledge of Judaism & heritage.

To Do: Make sure each piece of content includes the benefit(s) that would appeal to members.

STEP 2 | DISSEMINATE PILLAR-BASED <u>CONTENT</u> TO PRIORITY AUDIENCES VIA RELEVANT CHANNELS

GENERAL PRINCIPLES FOR TEMPLE'S COMMUNICATIONS CONTENT LEVERAGING PILLARS & ARCHETYPE

There are many best practices across channels and vehicles, but these are general principles to keep in mind especially with new teams and new processes.

- Content developed to highlight core pillar.

- Content employing a relatable, personable human voice?

- Content adapted to channel and vehicle (not simply using the same images or files across different platforms or channels).

- Digestible, usable, and referenceable content.

- Improved visual impact (branding and consistency).

- Volume and organization strategy – people like to be informed, but not without consistent structure or planning.

To Do: Apply these principles to all incoming work, reinforce with teams and within processes.

STEP 2 | DISSEMINATE PILLAR-BASED CONTENT TO <u>PRIORITY AUDIENCES</u> VIA <u>RELEVANT CHANNELS</u>

PRIMARY VALUES & KEY CHANNELS FOR EACH AUDIENCE

Align audiences (Young Families, Interfaith Families, Seniors, Young Adults, Married With Kids, Empty Nesters) to the priority brand pillars (Worship, Learning, Tikkun Olam, Belonging) via the channels that most resonate with them.

Doing so will create powerful messaging that builds connection.
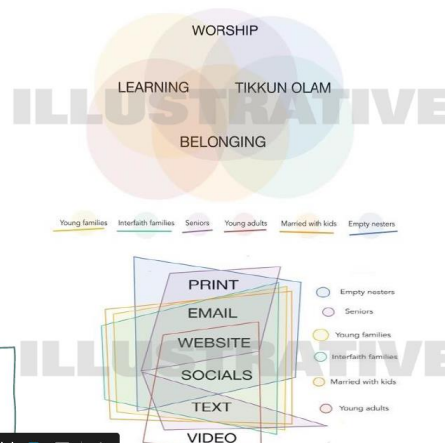
To Do: Worshop to establish what pillars and what channels matter most to each audience.

STEP 2 | EXAMPLE – USING AUDIENCES TO CONNECT PROGRAM MESSAGING TO CHANNELS

INTERNAL OFFERING	Programs/ Events	Munchkin Music	Munchkin Minyan	Tots Academy	Temple Shalom knows which programs are most relevant to each avatar.
	Core Pillars	BELONGING	LEARNING		Programs/events are filtered through Core Pillars to create messaging that speaks to the priority audiences.
	Priority Audience		YOUNG FAMILIIES		The Priority audience provides clues into which pillars and media channels are relevant
EXTERNAL MEDIA	Channel/Media Vehicle	Instagram	Email	Facebook	Well-crafted messages will then be shared through channels and media vehicles used by the priority audience

STEP 2 | TEMPLATE EXAMPLE FOR WORKSHOPPING – HOW AUDIENCES AND PILLARS INTERSECT

	Avatar	Top Pillars	Belonging	Learning	Tikkun Olam	Worship
A	Empty Nest Couple	Belonging, Tikkun Olam, Worship				
B	Young Families	Belonging, Learning				
C	Married (kids 6-12)	Belonging, Learning, Tikkun Olam				
D	Seniors	Belonging, Worship				
E	Interfaith Families	Belonging, Learning, Worship				
F	Young Adults	Belonging, Tikkun Olam				

Temple is all about community so it makes sense that each audience likely values "Belonging."

A secondary pillar indicates what else matters to them at this stage of life.

For example, priority audiences (B&C) value Learning, a differentiator for Temple Shalom. Temple can attract new members in these groups by promoting where they shine.

STEP 2A | OPTIMIZE AND MAINTAIN HIGH-IMPACT CONGREGATION-WIDE COMMUNICATIONS

WEBSITE

WORKING TOWARDS THE IDEAL:
- Build new website.
- Create evergreen content (about, programs, etc.) that aligns to brand strategy.
- Create blog for time-sensitive content.
- Organize content for easier navigation.

NEWSLETTER

- Create new layout for the entire newsletter using a branded template.
- Provide guidelines to newsletter content creators around pillars & benefits.
- Adapt newsletter to email format.

EMAILS

- Create an email scheduling system, including BH, SH, RS, and Aux.
- Use Temple Shalom branded email templates to create new emails – potentially unique to content type.

CALENDAR

- Find new calendar system to integrate into the new website platform.
- Differentiate events based on interest (avatar, age group).
- Present event information in multiple views (list, weekly, monthly, filtered).

TO DO: *SUGGESTED QUICK WINS*

- Update images on homepage and most visited pages to feature people showing the sense of community.
- Remove outdated pages.

- Organize content by pillar.
- Add a table of contents.
- Include Rabbi letter on page one.
- Remove clip art or other inconsistent visuals.

- Adjust subject lines to be more direct and to the point.
- Be more concise.
- Use the same formatting across emails.

- Eliminate redundant events.
- Provide more information so visitors aren't confused (titles, room #s, details).
- Include RSVP functionality.

STEP 2A | EXAMPLE – WEBSITE OPPORTUNITY

GENERAL BEST PRACTICES

- Allow members to access the website wherever they are.
- Create a user-focused experience.
- Organize content for easier navigation.
- Condense content for easier absorption.
- Follow image size requirements for improved visual impact with no delay in upload.

SPECIFIC RECOMMENDATIONS

Update online event calendar
- Filters by value, group, times
- Color coded by program types
- Event details with rsvp & calendar syncing features

Create a blog for time-sensitive content
- Lives as a page on the website
- Rotating blog posts highlighted at bottom of homepage
- Feature image
- Sourceable location for important messages (letter from Rabbi, mitzvahs highlights, announcements, etc.)
- Opt-in email notifications

STEP 2A | EXAMPLE – EMAILED NEWSLETTER OPPORTUNITY

GENERAL BEST PRACTICES

- Consider reducing length, 20 pages maximum.
- The core feature should be mobile friendly and legible.
- Use layout, images, and color with consistency.
- Provide structure or organizing principle for readers to engage with the content.
- Utilize live links to act, learn more, or RSVP.

SPECIFIC RECOMMENDATIONS

Newsletter outline in email format
- Cover page - branded coloring, new image every month, same layout every month.
- Table of Contents: using pillar structure – Worship, Tikkun Olam, Belonging, Learning;
- TS Announcements: Top 5 Highlights for the month .
- Letter from Rabbi (1 page limit), link to blog post
- Note from the President (500 word limit), link to blog post.
- Lifecycle Events.
- When appropriate, organize info by Council/Auxiliary (Connections, Lifelong Learning, Tikkun Olam, Brotherhood, Sisterhood) that is lengthier content, recaps, etc. (content less-suited for weekly blasts).
- Gratitudes (1 page, link to gratitudes page online).
- Kaddish (1 page, link to online source).
- Events in Review (3 Highlights, image and succinct message describing how values were delivered, i.e. the success of the event. Link to more photos.
- Printable Calendar and link to online calendar at the end.
- Opt-in email notifications.

STEP 2B | IMPLEMENT BEST PRACTICES FOR OTHER CHANNELS

PRINT

- Adapt content & layout to print rather than a simple PDF of other channel assets (e.g. email, social posts, copy).
- Create content that highlights value, with clean visual layout and imagery-based messaging to attract new members.
- Reduce content to encourage viewing.

EMAIL

- Target audiences receive relevant information.
- Adjust cadence to avoid inbox overwhelm.
- Include actionable links that help track user action.
- Write more engaging subject lines to increase open rate.

SOCIAL

- Visually communicate the core values of Temple Shalom through more strategic use of the platforms.
- Share on each platform (Instagram, Facebook, etc.) in the same way users do.

To Do: Review best practices across other channels, prioritize and apply current team capabilities.

To Do: Recognize different messaging for increasing member engagement vs. attracting new members.

STEP 2B | EXAMPLE – PRINT OPPORTUNITY

GENERAL BEST PRACTICES

- Use publishing layout principles to structure content, create hierarchy, and help readers engage with it.
- Include information that readers will refer to and re-engage with (print often serves as a physical reference point).

SPECIFIC RECOMMENDATIONS

Newsletter
- Table of contents, shorter in length, condensed content.
- Organized and visually consistent branding throughout.

Brochures (High Holy Day Packet)
- QR codes linking to program page on website.
- QR codes to register.
- Ability to tell a fuller story.

In-house or Mailed Fliers
- QR codes linking to blog posts for events, announcements, etc.
- Include call to action.

STEP 2B | EXAMPLE – EMAIL OPPORTUNITY

GENERAL BEST PRACTICES

- Make the best use of the email subject line: keep it short, grab their attention, talk on a one-to-one level.
- Let readers opt-in to email categories they want.
- Llink to references pages on the website when applicable.

SPECIFIC RECOMMENDATIONS

Two weeks-at-a-glance (formerly Weekly Reminders)
- Highlights for the upcoming week;
- Links to event calendar online.
- Call to action to RSVP via link
- Event details are found on the online event calendar, in blog posts, but not in email.
- Embedded links for each highlighted item.

Newsletter
- Upgrade visual imagery (eliminate clipart and generic stock images)
- Usable and shortened links, directing to program pages or event/announcement posts.
- Larger text, condensed content for online viewing, including mobile.
- Branded template developed for consistent visual presence month after month

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STEP 2B | EXAMPLE – SOCIAL OPPORTUNITY

GENERAL BEST PRACTICES

- Know your purpose for engaging with that social media post – (i.e., connecting with members, promoting Tikkun Olam initiatives, sharing news and events, etc.).
- Use high quality images and videos.
- Create a content calendar to keep track of what's been posted, but adapt when needed.
- Respond to commenters to keep them engaged.

SPECIFIC RECOMMENDATIONS

Facebook
- Usable and shortened links, directing to program pages or event/announcement posts.
- Post length limits for absorbable content.
- Links to video accessible worship.
- Utilize main TS FB as congregation wide comms; link affiliated groups.

Instagram
- Use images, creating a visual story of core values & overall message, i.e., using more people in imagery to communicate community and belonging.
- Utilize "link in bio", no QR codes – functionality doesn't work in stories or posts.
- Create posts developed specifically for Instagram.

STEP 3 | DEVELOP NEW MARKETING INITIATIVES THAT MORE DIRECTLY TARGET PROSPECTS

MAXIMIZE NEWLY-CREATED COMMUNICATION

Newer communication platforms/deliverables can be adapted for initiatives that target prospects in different age groups.

Optimize Website Build in organization that calls out new members and addresses their needs. Our anchor is our website, and the home page is the first impression for a prospect.

New flier placement Knowing what the different audiences care about will help the team make choices about which programming or events go in which spaces.

To Do: Determine where Temple Shalom would like to experiment once the core communications vehicles are enhanced & maintained.
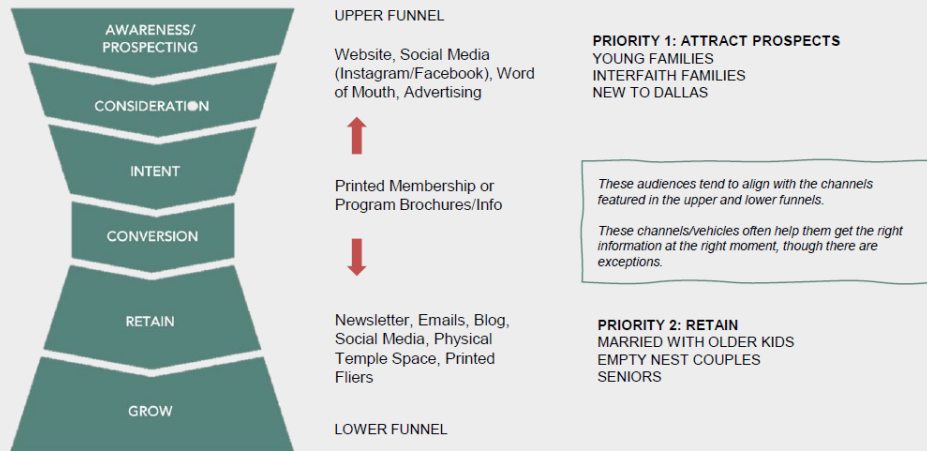
APPROACH PRIORITY AUDIENCES BASED ON VALUES AND INTERESTS

We've identified two audiences that serve distinct yet complementary roles in Temple's future: *Young Families and New to Dallas (all ages and stages).*

New channels Different channel/platform audiences intersect with Temple Shalom prospects in different ways.

To Do: Belonging staff and membership volunteers meet to determine which platforms are used to attract new members.

STEP 3 | EXAMPLE – THE FUNNEL AND PRIORITY AUDIENCES

AWARENESS/
PROSPECTING

CONSIDERATION

INTENT

CONVERSION

RETAIN

GROW

UPPER FUNNEL

Website, Social Media
(Instagram/Facebook), Word
of Mouth, Advertising

Printed Membership or
Program Brochures/Info

Newsletter, Emails, Blog,
Social Media, Physical
Temple Space, Printed
Fliers

LOWER FUNNEL

PRIORITY 1: ATTRACT PROSPECTS
YOUNG FAMILIES
INTERFAITH FAMILIES
NEW TO DALLAS

*These audiences tend to align with the channels
featured in the upper and lower funnels.*

*These channels/vehicles often help them get the right
information at the right moment, though there are
exceptions.*

PRIORITY 2: RETAIN
MARRIED WITH OLDER KIDS
EMPTY NEST COUPLES
SENIORS

RECAP ON OPPORTUNITIES AND WHAT'S NEXT

STEP 1 Create content pieces using pillars.

→ Use guiding questions to align with pillars.
Make sure benefits are included in all content.

STEP 2 Disseminate pillar-based content to audiences via relevant channels.

A Optimize and maintain high-impact congregation-wide
communications (website, newsletter, emails, calendar).

B Implement best practices for additional channels.

→ Apply and reinforce pillar principles.
Refer to these avatar diagrams for values & channels.

→ Take on quick wins in the next 3-6 months.
Plan to take on recommendations that move Temple
toward the ideal state.

→ Review, prioritize and apply best practices across all
other channels.

STEP 3 Develop new marketing initiatives that maximize newly-created
communication to more directly target prospects.

→ Determine new areas to experiment with communications.
Understand more about the avatar groups.

NEXT STEPS – AUGUST 8ᵀᴴ COMMUNICATIONS PLAN HIGHLIGHTS

Please direct any questions or comments regarding this Strategy Presentation powerpoint
or the prior Audit Presentation powerpoint to Communications Chair Diane Laner at
DianeLaner426@gmail.com.