

# Annual Planning Checklist

## PLAN RESEARCH

- Community Survey** review previous survey cycle results in CS dashboard
- Experience Survey** review data in CX dashboard filtered by last year
- Engage** review Engagement results from key Projects in Results & Analysis
- Organic** review Organic dashboard filtered by last year - drill into categories or projects with the highest volume of interaction or relevance

## PLAN DEVELOPMENT

- Engage** create and launch a Project to share key information and collect feedback on your annual planning process - include an Engagement on related planning topics
- Organic** set up new Organic projects for the coming year's strategic initiatives
- Organic** share results from your most recent Community Survey through your social media accounts via Publishing and via Press Release Generator in News Feed

## PLAN PRESENTATION AND APPROVAL

- Community Survey** download the summary report to share findings with stakeholders
- Engage** use Report Builder or Results & Analysis page to compile Engagement results for key strategic initiatives and share findings with stakeholders
- Organic** use Reports or Organic project dashboard to compile a report on public discourse for key strategic initiatives and share findings with stakeholders

## PLAN FOLLOW-UP

- Community Survey** include key plan elements in the next survey cycle questionnaire
- Engage** update annual planning Project to inform community about finalized plan
- Organic** create a custom digest to stay up-to-date on relevant Organic projects
- Organic** share your annual plan through your social media accounts via Publishing and via Press Release Generator in News Feed