



The Tactics Planning Matrix is a tool to help develop and identify what are tactics versus tasks in your campaign. Tactics need to be aimed at influencing a specific target (identified person or decision maker) to support your campaign goal(s). If your tactics don't influence a decision maker, then they are tasks. Tasks are important steps in conducting a tactic, but on their own, they are not helping you reach your goal. This distinction is important to consider so that you don't spend all your time on tasks without ever accomplishing the actual tactics.

#### Things to consider:

- After identifying your targets and tactics, create a list of tasks that the coalition members must complete to do each tactic.
- List tasks in order of what should be done first, second, and so on.
- Although it may seem strange at first, a coalition member should be responsible for most (if not all) of the tasks, in order to develop ownership of the campaign. Remember to consider skills and interests of coalition members before asking or assigning them tasks.

## Example Tactics Planning Matrix

Target	Tactic	Tasks	Coalition Members	Timeline
<p><i>Juan Rodriquez, City Councilmember</i></p>	<p><i>Meet Councilmember Juan Rodriquez and present at least 300 petition signatures of tenants in his district calling for smokefree apartment units and common areas.</i></p>	<ol style="list-style-type: none"> <li>1. Create petition form.</li> <li>2. Get approval of the petition form at a coalition meeting.</li> <li>3. Print petition forms.</li> <li>4. Identify locations in the community for signature gathering.</li> <li>5. Develop timeline for training, developing coalition roles, and collecting petitions.</li> <li>6. Create and hold a training for coalition members to learn how to gather petition signatures.</li> <li>7. Gather other materials needed (pens, clipboard, maps).</li> <li>8. Collect petition signatures in Councilmember Juan Rodriquez’s district.</li> <li>9. Identify coalition members to meet with Councilmember Rodriquez.</li> <li>10. Develop talking points.</li> <li>11. Schedule meeting with Councilmember Rodriquez.</li> <li>12. Create leave behind packet for meeting with Councilmember Rodriquez, including the petitions collected.</li> <li>13. Meet with Councilmember Rodriquez.</li> </ol>	<ol style="list-style-type: none"> <li>1. <b>Jane and Raul</b></li> <li>2. <b>Raul</b></li> <li>3. <b>Raul</b></li> <li>4. <b>Hannah and Paul</b></li> <li>5. <b>Marissa and Frank</b></li> <li>6. <b>Raul</b></li> <li>7. <b>Jane</b></li> <li>8. Collect signatures in the following locations               <ol style="list-style-type: none"> <li>a. St. Lawrence Martyr: <b>Maria and Hannah</b></li> <li>b. Community Bible Church: <b>Jane and Frank</b></li> <li>c. Mount Vernon elementary school: <b>Marissa and Paul</b></li> </ol> </li> <li>9. <b>Marissa</b></li> <li>10. <b>Marissa and Frank</b></li> <li>11. <b>Maria</b></li> <li>12. <b>Jane and Raul</b></li> <li>13. <b>Marissa and Frank</b></li> </ol>	<ol style="list-style-type: none"> <li>1. January—Coalition starts to develop petition forms and collect signatures at identified locations.</li> <li>2. February—Marissa and Frank work on summarizing information and develop talking points for meeting.</li> <li>3. March—Marissa and Frank schedule a meeting with Council Member Rodriquez.</li> </ol>
<p><i>Samantha Jones, Mayor</i></p> <p><i>Tip: You may have the same target listed in multiple rows if more than one tactic is aimed at them.</i></p>	<p><i>Meet with Mayor Samantha Jones to introduce data collected by the coalition in support of a comprehensive smoke-free ordinance.</i></p> <p><i>Tip: This column is a very specific action, which will influence the target to support your goal.</i></p>	<ol style="list-style-type: none"> <li>1. Identify coalition member(s) who will meet with the mayor.</li> <li>2. Develop specific talking points for identified coalition member meeting with Mayor Samantha Jones.</li> <li>3. Call the mayor’s office to schedule the meeting.</li> <li>4. Put together packets of key materials for the meeting.</li> <li>5. Hold a prep meeting with coalition members before the actual meeting.</li> </ol> <p><i>Tip: Break the tasks into as many small tasks as possible. The smaller the better because then you can engage more coalition members.</i></p>	<ol style="list-style-type: none"> <li>1. <b>Bill</b></li> <li>2. <b>Vanessa</b></li> <li>3. <b>Ernest</b></li> <li>4. <b>Tony</b></li> <li>5. <b>Diana</b></li> </ol> <p><i>Tip: This column is where you identify coalition members to do each specific task.</i></p>	<ol style="list-style-type: none"> <li>1. April—Vanessa and Tony will start developing talking points in support of the comprehensive ordinance.</li> <li>2. June—Bill will schedule a meeting to meet with Mayor Samantha Jones.</li> </ol> <p><i>Tip: It’s important to set deadlines for when activities will be completed, so the coalition stays on track to complete tactics on time.</i></p>

## Tactics Planning Matrix Worksheet

Target	Tactic	Tasks	Coalition Members	Timeline
		<ol style="list-style-type: none"> <li>1.</li> <li>2.</li> <li>3.</li> <li>4.</li> <li>5.</li> </ol>	<ol style="list-style-type: none"> <li>1.</li> <li>2.</li> <li>3.</li> <li>4.</li> <li>5.</li> </ol>	<ol style="list-style-type: none"> <li>1.</li> <li>2.</li> <li>3.</li> </ol>
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