

The challenge of communicating with different actors: is segmentation a good investment for think tanks?

A summary of experiences and current reflections

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Why segmenting?

Think tanks are increasingly asking themselves how they can fine tune their communications so as to interact more effectively with the several stakeholders that are part of their field of action: from politicians and bureaucrats to similar organisations and donors.

In this regard, many think tanks are reaching a second stage in terms of how their communications has evolved, one that goes beyond concentrating on being visible and recognized by relevant stakeholders. In this second stage, where they become more focused on research informing policy, and thus in how to more effectively reach diverse actors who play different roles in the policy making process and hence have different needs and interests. Thus, several institutions begin to reflect on how to tailor their channels, tools and messages to more effectively reach them. This is basically what they currently understand by segmentation.

In order to determine the potential contribution of a good segmentation strategy, it is important to distinguish if it is oriented to strengthen one or more types of communications. Indeed, it's not the same to segment to reach more effectively the different groups that could contribute with financial resources to the organisation than segmenting to reach diverse decision makers who play different roles in the policymaking process. To be clear about the main purpose of segmentation, it is useful to appeal to the basic typology of communications that is presented on graphic 1.

The proposed typologies (Weyrauch: 2007) are based on different purposes that guide the actions in communications:

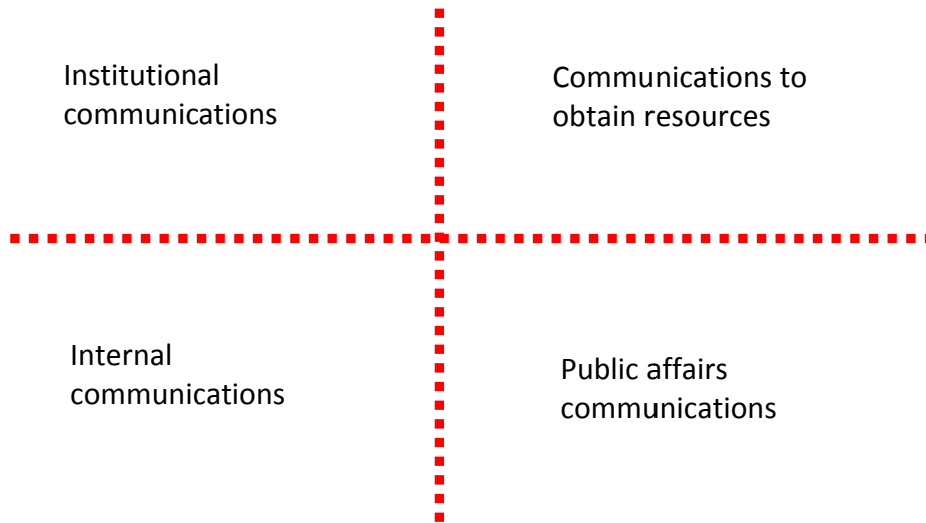
- **Institutional communications:** aims to increase the organisation's capacity to affect people's way of thinking, feeling and behaving (values, ideas, norms, related to the organisation's institutional dimension). This does not only imply communications about the institution and its attributes but also the communication to build those attributes and the institution itself.
- **Internal communications:** actions directed to those who give autonomy to the organisation (employees, volunteers, management board, etc.) in order to promote their integration to the institution and the alignment of activities with its main objectives.
- **Public affairs communications:** it is oriented to promote consensus regarding the *raison d'être* and the objectives of the institution, as well as its proposals and ideas, in the public

sphere among all the stakeholders that are agents related to or affected by the work of the institution.

- **Communications to obtain resources:** actions oriented to obtain the necessary resources to maintain the organisation throughout time (money, support, volunteers, etc.)

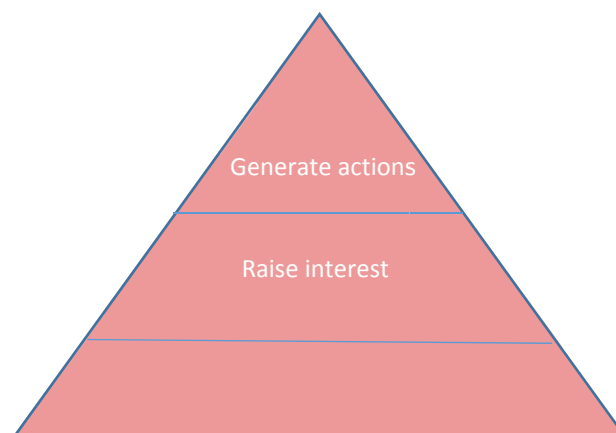
Even though these typologies overlap when developing diverse communications tools and activities and that there are not clear boundaries among them, it is important to clearly define what are the main goals of segmenting communications.

Graphic 1: Communications typologies according to their main purpose:



It seems that on the way towards this second stage, segmentation of communications is one of the main strategies to go from a very general and massive communications goal to more specific and particular targets. As the pyramid below reveals, organisations usually have three main communications goals which address a gradually smaller group of audiences. Thus, a first and general objective which probably leads communications efforts in the first stage of think tanks is generate awareness of the existence of the organisation (or a service, product or idea). This is followed by communications strategies more focused on a smaller array of audiences that have expressed some interest in the organisation (or a specific idea/proposal). Finally, there is a third set of efforts that are directly address to more specific and even more reduced nucleus from which a concrete action is expected (i.e. support with funds a specific project, draft a program review to incorporate policy recommendations, etc.) This path is illustrated on Graphic 2:

Graphic 2: Communications typologies according to their main purpose



Segmentation can be applied at several and different levels

From the above discussion, the learning which emerges is that if a think tank gets to differentiate how and what they communicate, while adapting the message, the format and the channel to each stakeholder's profile, they increase their potential "to be listened"; to raise interest in what they promote and even, generate desired behaviours.

However, there are also institutions like CEBRI with an alternative point of view regarding segmentation. As Rafael Costa argues, this organisation's mission is to inform people that are interested in international affairs. Thus, for them, the content has to be shared in the same way with everybody, regardless of who has access to it. Consequently, the low-budgeted mass digital tools are the strength of this type of institutions.

A majority of the interviewed think tanks are oriented towards a different direction, even making their segmentation mechanisms more sophisticated. As Jeff Knezovich indicates on onthinktanks.org, this possibly happens because it is believed that the segmentation contributes both to the institutional communications as well as to public affairs: "a centralized communications team should be able to support others to reach their target audiences and, at the same time, focus on building up the think tank's (or its initiatives) reputation and credibility".

In this sense, Dolores Arrieta, CIPPEC's communications director emphasizes: "it is very important to have someone looking at the coordination of these segments from above, to avoid that the relationship with a specific niche is only focused on a concrete topic (i.e. a project or area of work) instead of being able to offer diverse points of entry for those persons /organisations to interact with your own institution. She also warns about the risks of hyper-segmentation: although it's necessary to take care adapting the discourse to each stakeholder, it's necessary to also take care of the institutional bond by ensuring an integrated and whole institutional message and avoiding just a technical interaction. In other words, one needs to ensure that the interaction is not limited to a particular need/issue but that it also nurtures a wider relationship with the organisation.

Additionally, it is necessary to pay attention to the coordination among the niches to take care of consistency and coherence that directly affect the image and credibility of the institution.

Finally, even if direct evidence hasn't been found in the interviews to demonstrate that segmentation is the most accurate strategy to reach diverse objectives with specific stakeholders, the think tanks acknowledge that they had more feedback and better quality responses when they adjusted their communication products to the characteristics of each type of actors. Moreover, there are lessons learnt regarding how to segment communications in an effective way that will be shared in the following pages.

Box 1: Usual general stakeholders:

- Politicians and government organisations
- Journalists and media
- Funders
- Influential opinion leaders
- Other think tanks and civil society organisations
- Universities and centres of academic production
- Citizens
- Young people

It is worth stressing that it would be interesting to carry on a systematic and rigorous study to detect in which way the communications segmentation helps in effectively achieving the think tank's most relevant communications objectives, especially in terms of policy influence.

How to segment/ Step 1. Identify and know your stakeholders

Initially, every segmentation strategy requires first to establish the main stakeholders that could affect or be affected, in a general way, by the think tank's mission and objectives, and more specifically, by its areas' objectives and projects.

In this sense, the interviewees have explained that that they use some concrete methodologies to map these actors (see box 2) so as to better reach them. These tools diverge in complexity, frequency and levels of implementation. However, a common element is that all organisations conceive stakeholder mapping as the first and basic step towards an effective segmentation.

While some organisations define in a generic way the audiences with whom they want to interact, there are others that do it only at a program and/or project level. In between, there are also institutions that combine an institutional approach with a program or project level approach. This means that they define the types of main actors that they want to reach in a sustainable way through institutional communications products. But their communications unit also provide specific support to the programmes and projects by developing concrete and particular communications products for specific profiles of actors.

Probably, the way of segmenting depends on the organisational culture regarding the decentralization or centralization of responsibilities related to communications, and the role that is given to the communications unit. To illustrate this, the next graphic summarizes a continuum of positions that go from a "think tank-centred" communications to a "project-centred"

one. The first organises segmentation according to institutional and general objectives by defining specific products and stable means to reach the relevant stakeholders, in a very general way. The second maps stakeholders at a project level, so there are always different and more concrete, and it entails a more detailed segmentation and also communicating differently with each on the real ground. Additionally, there are alternative models like those think tanks that approach segmentation at a programme level or combine project and program approaches with the institutional one. There even are think tanks like CSTEP that organise their segmentation according to specific research products, by establishing concrete actors that receive each of these.

Box 2: Tools to map stakeholders

- [Stakeholder analysis according to their interests, resources and power \(CIPPEC\)](#)
- [Alignment, interests and influence matrix \(ODI\)](#)
- [Net-map](#)
- [Stakeholder analysis according to the degree of proximity \(GTZ\)](#)
- [Stakeholder power analysis](#)
- [Tactical mapping for analysis and planning](#)
- [Tool Do no harm \(Grupo FARO\)](#)

Graphic 3: Continuum of communicational focus.



Although the project's approach allows working more precisely to establish specific communications strategies that allow interacting with each actor, it is worth warning about the risks of organizing communications without taking care of an overall organisational coherence. As Jeff Knezovich argues on *onthinktanks*: "Research projects have their own life cycles with different potential products that are generated through the project however frequently large silences are generated while conducting the research (...)". RIMISP has developed an intelligent way of confronting this challenge: they publish newsletters every two months that include information about different projects so it's possible to follow who is working on these issues without staying attached to one specific project or to limit ongoing communications to general institutional information.

On the contrary, a think tank centred approach could confront the challenge of having too many ideas, proposals, projects that target the same type of audiences through generic tools with limited space and frequency to reflect the diverse topics in which the think tanks works. With such an approach, communications would not be able to answer the researcher's specific needs, especially regarding policy influence.

Going beyond a list

After identifying and listing the type of stakeholders, many think tanks invest resources in organizing and prioritizing them according to different criteria: for instance, by placing them in rings with diverse degrees of closeness to the institutional nucleus or by grouping them according to their power and interests on the specific policy issue, etc. For more information regarding the ways of organising and working more strategically with segmentation criteria please refer to Boxes 2 and 3.

Finally, it's important to emphasise that there are new

Box 3: segmentation criteria

- According to the degree of proximity to the organisation's nucleus (i.e political stakeholders, funders and journalists)
- According to geographic levels and types of state power
- According to their relevance for the strategic agenda or other objectives from the organisation's annual plan and key projects.
- According to working issues/areas/ projects.
- According to their power to practice changes/influence any issue.
- According to the level of needs of information offered by the think tank.
- According to political timing (windows of opportunities for renovations, changes, etc.)

emerging initiatives from think tanks, to get to know better their stakeholders and to reinforce the bi and multi directional communication. This are usually similar to customer surveys that are done by private companies or to opinion polls that are requested by politicians. Even if this type of studies tend to be burdensome and are frequently beyond the available budget and time of any think tank, they can become viable ways of improving the systematic knowledge about certain stakeholders.

Indeed, new technologies and digital tools allow a level of interaction with great potential for monitoring and evaluating what is happening with different actors and how they are reacting to what the organisation says. For example, with Google Analytics, it is possible to see from the geographic localisation of the website's traffic to how they share or not the information we are socialising.

Another possible way for think tanks to know better their audiences is to create partnerships with other institutions interested in the same groups to identify in a collective way what are their needs, issues and how they interact with the information that they receive about our own interests. For example, this could be done by organizing a meeting of think tanks like GRADE and onthinktanks did in Peru to ask their audiences what they need from them.

The Tipping Point: an original methodology to map stakeholders

Currently three think tanks in Central America (FUSADES and FUNDANGO in El Salvador and FOSDEH in Honduras) are carrying out the pilot of a new methodology to classify stakeholders called "The Tipping Point" that was developed by the consultant Yolanda Talavera. Inspired on the book with the same title, published by Malcolm Gladwell, this methodology is based on the observation of public policy processes in Latin America, their complexity and distinctive features. The key stakeholder mapping at an institutional level is less pragmatic for a lot of think tanks because their advocacy processes change depending on the complexity and controversy of each issue and the context. The methodology "The Tipping Point" goes back to the agenda based on research as a starting point as well as previously planned research and advocacy activities that establish the relevant stakeholders according to the issue and the activity.

The perfect mix of the chosen stakeholders is based on the profiles suggested by Gladwell to create communicational epidemics. These profiles are: well-informed, connectors and sellers. The pragmatic component of this methodology is the identification of key stakeholders for the think tank's different areas of interest; study/discussion groups, conferences/ thematic presentations, publications, media appearances, among others. In this sense, besides identifying the key stakeholders according to subjects, it is possible to define the type of engagement that will be aimed with them, therefor finding the adequate mix that will generate communicational epidemics with its own life.

How to segment/ identify what is valuable for each of them

After identifying, classifying and getting to know better the different stakeholders, the interviewees' experience and the literature about this issue suggested that think tanks apply two main strategies to establish how to communicate with them: 1) they scan all the organisational "offer" (research products and ideas) regarding areas of interests (content level) and 2) they detect which are the most adequate channels to build bonds and that can enable sharing these contents (format level).

Putting together this information (who, what and how) works as a basis to continue with the segmentation, by identifying important issues and formats that are adequate to each type of stakeholder. Also, some gaps will emerge: for example, there are some issues and channels to reach certain types of stakeholders that the think tanks does not manage, and there are also some issues and channels that are not effective to reach the prioritised stakeholders.

Thus, diverse scenarios are possible:

- 1) Almost all the channels reach the different audiences making no distinction among them
- 2) There are issues that are attractive to a few prioritised stakeholders
- 3) There are relevant stakeholders that we don't reach with our areas of interest or adequate channels (for example, university students that could be engaged through Twitter).
- 4) There are more flexible channels that allow us to reach different stakeholders in specific ways (i.e. an annual dinner).

Consequently, and depending on the available resources, it will be possible to decide which communication actions will be reinforced, modified or cancelled and which ones will be started.

In this regard, the following chart presents the type of channels and tools used by think tanks that have been more successful for reaching specific stakeholders

Type of channel/tool	Stakeholder
External newsletter	Peer organisations Donors
Social media Videos	General public, specially other organisations and university students/young people and media

Forums/Seminars/ Open events	Universities Central Government Civil servants with whom there is a close relationship
Internal newsletter	Executives Contributors
Public Policy documents	Subnational and local governments Legislators Decision makers Candidates
Publications (books, research outputs, essays about and specific issue)	More stable civil servants/ technocrats
Personal meetings/close events	Politicians with whom there is less proximity/ less developed bonds Politicians with whom you work confidential or delicate issues Journalists
Training/Debates	Journalists Future civil servants Candidates
Exclusive/outlined information	Journalists

Networking opportunities or visibility and recognition (events/ bi or multilateral meetings)	Politicians Donors
Inventory of publications and research	Universities University students Future decision makers
Media (specially columns and opinion editorials) ¹	Civil servants Politicians Donors Journalists/ media persons

In addition to all the formats and specific channels, the segmentation can involve the use of different types of languages and tones according to the stakeholders that are expected to be reached. In CSTEP's case, the think tank has done an important effort to make researchers use a less technical language so they can communicate in a simple and direct way with audiences such as journalists and politicians. To do so, the organization has developed a standardised guide and basic orientations to support researchers on their way of reaching effectively the established stakeholders.

It is important to note, as Rebecca Pointer from PLAAS has highlighted, that establishing personal relationships is key as a platform for all the above mentioned communications tools (meetings, workshops, policy briefs, etc.). All media are better supported by personal relationships, which are not only in hands of communications team but of researchers too. Therefore, working in tandem for trust building is very important.

Finally, the segmentation is organised in many cases, according to the contents. In this regard, SAIIA's approach is very interesting since it highlights the importance of being guided by the user when communicating. For this, they take advantage of electronic media, such as the possibility for

¹It is interesting to notice that many organisations have mentioned the increasing need to personalise the information for each journalist or media. For example, by offering exclusive data. Another way of getting closer is distinguishing the different types of contents included in a big conference to only offer those who are relevant to each journalist, depending on their particular area of interest, as CSTEP has done. Others, like SAIIA, segment journalists in their database to send them specialized information according to their profile and interests.

people to subscribe to a newsletter according to their policy subjects of interest; or to choose through the website the type of contents that they want to look at: according to the subjects, types of publications, region, country, programme, etc.

How to segment/ Work with others (internal and external)

Briefly, besides working to identify and improve the existent channels, it is important to emphasize that a good segmentation can be better achieved when working with other contributors from the organisation, either by taking advantage of their skills (for example, those who are excellent public speakers could facilitate an open event), their opportunities (for example, a program director who has access to a governor because he or she travels frequently to the same province), and their knowledge/contacts (for example, a research assistant who is highly skilled in writing messages on Twitter).

An example of a valuable practice is the strategic board organised by FUSADES every Tuesday in which the president and areas executives discuss and identify needs and then work on (and sometimes learn from) other areas to coordinate communications.

CIPPEC also highlights the utility of this dialogue between communications and researchers that combines knowledge, ideas, tool management and policy abilities. This allows the conformation of a collective integral vision of who is targeted for communication, what is communicated as well as new ways to reach those who are not yet in the circle of communication.

Also, an effective articulation to the other think tank members is a key to maintain the organisational database updated so it will nourish the communications unit. Indeed, ECDPM has pointed out the need of taking care of the database, with the researchers' support due to the high rotation of civil servants that work in their same area of interest. Only through the researchers' active involvement that is constantly connected with these changes, it is possible to be sure that they are reaching the right people.

How to re-segment/ Ensure continuous improvement

Segmentation is not a job that is done once; even during a project's lifecycle it is possible that the organisation could include a stakeholder or a group of new stakeholders (for example, when opposition legislators request help for the design of a draft legislation), or detect a specific communications format that is not useful (for example, when a blog doesn't have followers or comments).

Some think tanks can also get stuck with categories. This usually happens when communication teams and/or research teams in think tanks segment their audience, as a separate task or a strategy, which becomes delinked from the research and evidence. There is always the risk that categories identified through segmentation become ends in themselves, losing sight of the purpose of the research, the opportunities that emerge in the external context and the real needs of the end users.

Indeed, the external context is always changing and offering opportunities for research teams to connect with. The question to be done here is: do we really know who the audience is and what they are looking for? What is the external context telling us about the world of the audience? How does the intelligence from the external world connect with our evidence from the research?

In this sense, and going further, the big insights about potential audiences and opportunities to influence behaviour reveals itself at the overlap between three contexts: research evidence, the external context and research communication. At the overlap we are likely to generate many more segments for engagement rather than focus on the usual categories.

In terms of refining segmentation, a major part of interviewees receives some sort of feedback about the effect of their channels and communications practices but not in a very systematic way. Through trial-and-error approach, they identify ways to adjust their communication products, or detect the need to innovate or stop the use of certain tools.

Eventually by repetition, think tanks develop strategies that are effective and learn how much time and resources are required to implement them. In some cases they then decide their institutionalization. They also innovate or adapt these strategies to each project's particular needs.

Many acknowledged the need to add complexity to the stakeholder mapping as a key tool to better reach diverse audiences. In this sense, some consider that communicators should work more frequently on the ground, for example by carrying out an analysis and diagnosis before working on the field. For example, Grupo FARO is considering developing a popular communications workshop so that they can develop capacity to use words and messages that are appropriate to each location within a publication they issue.

On another hand, FUSADES is looking to perform a constant analysis of how stakeholders consume diverse media (i.e. if they spend too much time active in Twitter) to adjust their strategies. A way of doing this is inviting them to focus groups.

Continuous improvement also involves solving tensions that emerge from evidence and experience. As an example, CIPPEC confronts a dilemma between being massive message or focusing on a specific niche: it permanently seeks to balance immediate gratification of going massive (due to the reputation and branding it offers) with a more direct and focused approach (which allows for deep analysis for a more narrow public). Thus, they decided to only conduct massive strategies when this is very justified, for example for campaigns related to projects that deal with public policy that bears a high degree of social consensus and low controversy, or for projects that aim to gather ideas from different groups, etc.

Finally, there are think tanks like ECDPM that have strengthened their monitoring, evaluation and learning processes because of their strategic importance. To do so, they have a complete M&E internal system that is implemented through several tools, , including the electronic measuring of audience interest, reader surveys, targeted phone interviews, analysis of unsolicited reader feedback and regular collection of evidence of the impact of our work on policymaking (e.g., documenting when a policy option put forward in an ECDPM publication is discussed during policy negotiations). The unit feeds this information back to the programmes and departments for further analysis and learning. Consequently, they can improve how certain audiences are reached. This is complemented by an external study that is done every 5 years at a qualitative and quantitative level.

ANNEX 1/ SEGMENTATION STUDY GUIDING QUESTIONS

1. Which are the main audiences of XX?
2. Are there institutional mechanisms to map stakeholders, according to projects and programmes?
3. From the Communications Department, do they design strategies and specific communications actions for each audience? Which ones?
4. How have you chosen or will choose the actions and tools for each audience?
5. Are there any successful examples? Why?
6. Which reflections could you add to the segmentation issue that could be useful for other think tanks?

ANNEX 2/ INTERVIEWED ORGANISATIONS:

1. CEBRI, Brazil, Rafael Costa
2. CIPPEC, Argentina, Dolores Arrieta
3. CSTEP, India, Annapoorna Ravichander
4. FUSADES, El Salvador, René Gonzalez Hernández
5. Grupo Faro, Ecuador, Karla Armas
6. PLAAS, South Africa, Rebecca Pointer
7. RIMISP, Chile, Mariana Arellano
8. SAIIA, South Africa, Riona Judge McCormack
9. ECDPM, Belgium, Melissa Julian