

Celebrating Anniversaries & Milestones

Pre-Planning Checklist

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Goals & Objectives

A milestone anniversary is a unique opportunity to reach target audiences and significantly accelerate your business development efforts to leapfrog the competition.

But, without a carefully drawn roadmap, major anniversaries can be a trial of confusion and costly missteps. It's easy to get lost in a bewildering maze of "great ideas" that make little strategic sense for your organization and fail to deliver the expected return on investment.

To avoid such confusion, you need to determine how important it is for your celebration to advance the overall strategic goals of your business, what existing expectations your anniversary must meet, and how you will measure the impact of your anniversary on your bottom line.

Whatever your goals and objectives for your anniversary, they must be carefully considered and documented from the outset to help you allocate resources for your anniversary year.

Connecting Celebration Goals with Business Goals

- Have you determined to what extent your celebration goals should parallel strategic organizational goals? How will those celebration goals work in tandem with the business objectives of key departments such as marketing, advertising, public relations, corporate communications, etc.?
- Who are the most important stakeholders for each part of your anniversary, and what strategic messages should programs convey to them? Which of your existing business activities can be adapted most cost-effectively to blend into celebration goals and objectives? In what areas do you need to develop special milestone-specific elements?
- To what extent will your various constituencies be included in your celebration — employees, shareholders, suppliers, communities in which you operate, etc.? What goals and objectives will you set for each one? What level of priority do they represent in terms of the celebration resources that will be allocated to each?
- How will celebration goals and objectives be communicated to people inside the organization? How will they understand the roles they are to play in helping the organization achieve those goals and objectives?

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Reflecting Your Culture and Image

- What are the distinctive qualities of your products, services, and organizational character that your milestone celebration should convey?
- What kinds of celebration programs are most appropriate for your particular products, services, and culture? A history book or other printed piece? A web resource for internal or external audiences? A video to be shown at an event? A live program or several? A gift to certain constituencies? Other unique programming?
- How can you use interviews and surveys with key internal and external groups to ensure that your celebration is in concert with the image that your constituencies have of your organization and the image you want them to have in the future?
- Do you want to use your milestone celebration as the platform for changing the image of the organization? Do you have a clear idea of what that new image should be?

Assessing Return on Investment

- Have you established specific measurable goals and objectives for your celebration as a basis for assessing your return on investment? Have you determined the criteria upon which your return on investment will be based?
- How will you determine in advance which prospective celebration plans and programs are most likely to achieve the specified goals and objectives — and which ones will deliver the highest return on investment?
- How can you establish effective contingency plans that will allow you to minimize your risk and adjust quickly to alternative courses of action that may be required?
- What guideposts should be created as a means of checking progress toward your goals and objectives in process along the way? Who will be responsible for monitoring performance against those guideposts, and how will progress be reported?

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Organization

A major milestone celebration can span a period of time as long as two to three years from initial planning to implementation, wrap-up, and follow-up evaluation. Sometimes, though, it may be necessary to compress the schedule into just a few intense months. Whatever your time frame, an anniversary campaign is a complex undertaking that can become a logistical nightmare without the proper organization.

Since this type of celebration often derives its creative energy and produces its value at many levels within an organization, it is crucial to balance the need for control with the potential benefits from widespread employee involvement and contribution.

Establishing Task Forces & Assigning Responsibilities

- Which individual/department will play the role of leader or chief coordinator in the planning process and subsequent implementation of the overall celebration? What are the essential qualifications for people who will be playing this key leadership role?
- What are the various major segments of the celebration that must be taken into consideration, and which individuals/departments will form the task force(s) for planning and implementing each one?
- Who will be responsible for designing and conducting the program evaluation process?
- Are the major task forces headed by senior managers who have a clear and documented mandate from the Chief Executive Officer?
- How will interdepartmental activities and responsibilities be coordinated?
- What role will senior management play at each step in the process? Who will review creative projects and have final okay on releasing publications or productions to their intended audiences?

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Staffing the Effort

- What skills will be needed for each step of the anniversary program — from research and planning, to execution and dissemination of information, along with evaluation?
- How much current staff time can be shifted from existing day-to-day work to focus on celebration activities?
- How much support and what types of skills will you require from outside resources, and where are they needed most?

Discovering Your History

- What is the current status and condition of historical documents (written and audio information, photographs, verbal histories, etc.) and three-dimensional artifacts. How accessible are they?
- Are there materials and important sources of information outside the organization that need to be researched and collected?
- Who are the memory keepers for your organization whose stories have not yet been recorded? How will you capture stories, artifacts, and memories from employees, partners, and customers throughout your organization?
- How will you determine the significance and potential application of historical and more recent documents, stories, and other materials?
- How do you minimize the risk of rare historical documents and materials being lost or damaged during the planning and implementation process? How should they be stored and catalogued when you are done using them?

Coordinating Site Celebrations

- How will site locations (non-headquarters units) be involved in the celebration?
- How much will they do on their own initiative?
- How much support and direction will be provided by headquarters?
- How much consistency do you want among the various activities at different site locations?
- How, if at all, will they be included in any central headquarters activities?

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Internal Communications

Employees should be part of every step of a milestone anniversary celebration — from planning, to implementation, to evaluation. If you already have a successful employee engagement and retention program, make sure to integrate the techniques and tactics of that program throughout your anniversary program while also looking for ways to improve employee relations further. If you're facing employee relations challenges, your milestone anniversary program can become a powerful beginning to a new way of communicating with employees at every level of your organization.

Integrating Anniversary Programming and Employee Engagement

- What employee relations challenges can be addressed through anniversary programs and employee participation?
- Are there any groups of employees — traveling sales staff often fall into this situation — who haven't been very involved in company-wide initiatives in the past? How can the anniversary engage them with their colleagues in other departments and establish new paths of communication?
- What role will employees from various levels and departments of your organization have in planning, implementing, and evaluating all anniversary programs? How many employees will have leadership roles for the anniversary year and how will they be chosen? How will their work be recognized at the conclusion of the anniversary year?
- How will communication be conducted throughout the company, and how will employee input and feedback be integrated into the planning process and throughout the anniversary year? How can anniversary programs be integrated with current employee communications methods, including newsletters, employee feedback systems, employee relations boards or groups, etc.?
- How should the majority of employees be involved in or experience anniversary programming — will they tell their stories, donate artifacts, manage local programs, help plan or attend company-wide events, or participate in more ways?
- How will external communications pieces (see next section) mesh with employee feedback and communications programs? How can employees be empowered to support the marketing and publicity efforts as part of the anniversary year?

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Promotional Connections

With effective teamwork and creative planning, a milestone celebration can serve as the cornerstone for numerous promotional activities. You can inject new life into old products, recall fond images from the past to inspire confidence in new products and initiatives, and reinforce loyalty from a variety of stakeholder groups.

Making the Marketing Connection

- In what ways can the celebration be built into marketing and advertising programs/strategies?
- What types of new product introductions might be linked to successful historical campaigns, products, services, etc.?
- Are there any mature products or services that could get a boost from a milestone-related marketing campaign?

Generating Publicity

- What types of stories and information will capture the attention and interest of the media in order to generate free publicity?
- Who will be responsible for developing the strategy and establishing the schedule for releasing news about the celebration? Who will handle the preparation and distribution of those releases?
- What types of tools and instructions should be provided to site locations for generating publicity through their local media?
- How might your celebration be used to support your community relations and philanthropic goals?

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Scheduling & Timetable

Nothing ensures successful implementation of a major milestone celebration as much as detailed and thoughtful planning. It is not uncommon for organizations to begin that process as much as two to three years in advance, although if necessary the process can be streamlined with expert guidance. One of the first steps is to establish a timetable for each of the three major phases of the celebration process: planning, implementation, and evaluation.

Ensuring Timely & Efficient Progress

- Are there any specific milestone dates that must be celebrated or acknowledged as part of the anniversary? Are there multiple dates that can be part of an integrated calendar, designed to build momentum over the entire course of the anniversary year?
- What are the key components of the three major phases of the celebration process (planning, implementation, and evaluation), and in what order will they be addressed?
- Have you pinpointed the dates when you want key events to occur, assessed the amount of time that will be required to execute each step leading up to each of those events, and identified the dates when each step should be initiated?
- What is required in order to create and maintain an effective master planning schedule?

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Budget

Perhaps the most significant issue to keep in mind when planning the celebration of a major milestone is how easily resources can be wasted. A number of key budget questions should be addressed to ensure that money is spent wisely.

Establishing Guidelines

- What are the expectations for accountability in managing the celebration budget? Should the celebration be designed and positioned as a special expense or as an investment opportunity funded out of a certain department's budget?
- What resources already dedicated to existing programs can be integrated into the anniversary year?
- What is the total budget the organization is prepared to allocate for the celebration, including money dedicated to projects that can be folded into the anniversary?

Allocating the Investment

- What portion of the budget should be dedicated to each anniversary goal? What are the expectations for a financial return on investment for each of those goals?
- Will the entire budget be allocated in a single fiscal year or spread out over two or more years?

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About Us

We're not just business historians — we're anniversary strategists. We combine expertise in marketing, PR and employee communications with our skills as top-notch writers, researchers and designers to make sure every anniversary dollar is wisely spent. We have extensive experience in many industries, including financial services, health care, transportation, food and grocery, manufacturing and non-profit.

Our Clients

Abbott	Olin Brass
Alberici Constructors	Peabody Coal
Anheuser-Busch Brewery Tours	Pet Incorporated
Arlington Greens Golf Course	PRIDE of St. Louis, Inc.
Boston Scientific	Purina Mills
Chiron Corporation	Ralls County State Bank
City of Collinsville	Sachs Properties/Chesterfield Village
CF Vatterott	Schnuck Markets, Inc.
Fru-Con Construction	2nd Battalion, 11th Field Artillery Regiment, U.S. Army
Greensfelder, Hemker & Gale, P.C.	Splash City Family Waterpark
Lincoln Electric	Staples
Lewis & Clark Bicentennial Celebration	Today & Tomorrow Educational Foundation
Lewis & Clark Mobile Interpretive Center	Vecellio Group
Looking for Lincoln Heritage Coalition	Watlow Electric
Mills Properties	Western Union
Murphy Company	W.L. Gore & Associates
Norfolk Southern	

Our Services

Anniversary Consulting/Planning	Employee Engagement Programs
Anniversary Graphics	Gifts & Giveaways
Books & Brochures	History video/DVDs
Celebrations & Events	Media Relations & Advertising
Displays, Exhibits & Museums	Research—archival and oral histories



Put Your Anniversary to Work!

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