



MESSAGE TRIANGLE

Craft your key messages for encouraging saving at tax time

Messaging is a means to communicate effectively so that people understand an idea and are motivated to take an action.

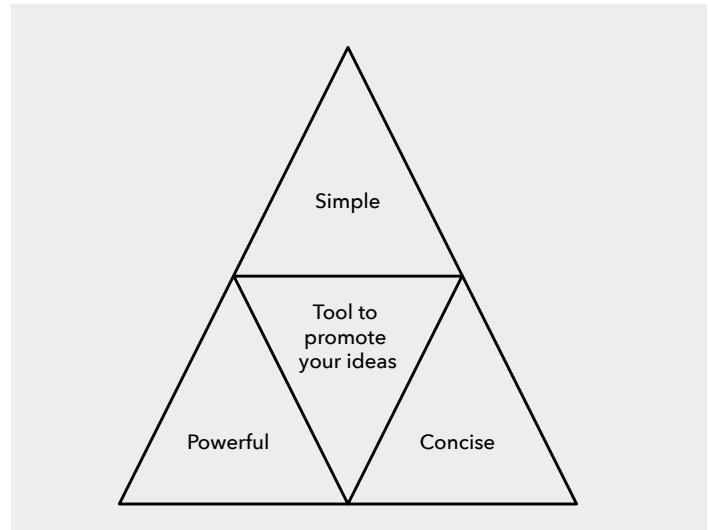
The message triangle is a tool based on the principle that people focus best on messages built around three or four consistent points. The message triangle represents three simple, powerful and concise points that center around a unifying theme.

Once you have developed a message triangle around a given action, it becomes the foundation for your pre-tax season marketing materials, onsite materials, volunteer talking points, and other communication tools. The statements and supporting evidence in your communications should tie back to one of your three messaging points. Doing so keeps your site on-message.

Using this tool for your program marketing

The message triangle is designed to create a set of messages about a given product or service.

Focus on one messaging strategy for each product or service. You may find it much easier to create messages and make the case for single product or service by first identifying a specific target audience. For example, you could first consider who your primary customers are, based on past experience, then create separate messages for savings encouragement and for tax services that



may be compelling to that customer base. You can later blend the messages for marketing materials.

Create your local messaging prior to considering how to incorporate national messaging such as that provided by *Save Your Refund*, *AmericaSaves* or other national savings campaigns. By establishing your messaging points first, you will be able to better integrate the national messaging to your existing activities and better target your audience with those promotions.

Consistent messaging is about maintaining common themes not precise language. The purpose of the message triangle is to provide consistent themes and messaging points. You are not locking in precise language or "catch phrases" that need to be recited verbatim. Rather, your messaging is about logically connected ideas and themes that help your audience to appreciate the benefits to them of a product or action.

MESSAGE TRIANGLE WORKSHEET

Step 1: What are the features of the product or service you are offering?

Start by reviewing and clarifying your understanding of the product or service that will be the subject of your messaging.

- 1 **What are the requirements for participating? Are there other relevant restrictions?**
- 2 **What are the five most important features people should know about the product or service?**
- 3 **What are the costs and time commitments to the consumer?**
- 4 **What are the benefits of the product or service to the consumer? How does it make their lives better?**
- 5 **What other information about the product or service is important?**

MESSAGE TRIANGLE WORKSHEET

Step 2: Define the action and audience

Ask and answer these fundamental questions.

- 6 **What action are you proposing that the taxpayer take?**

- 7 **Who is the target audience that you want to take the action? Be as specific as possible.**

- 8 **What are the benefits for the taxpayer and for the larger community?**

- 9 **What immediate concrete step should the taxpayer take now (at the tax site)?**

- 10 **Besides your target audience, who else is involved? In particular, who will help you transmit your message about the product or service to your target audience?**

MESSAGE TRIANGLE WORKSHEET

Step 3: Consider the context

11 **Describe five characteristics of your target audience. Focus on characteristics that relate to whether, when, and how they would take the action you propose.**

CHARACTERISTIC 1	<input type="text"/>
CHARACTERISTIC 2	<input type="text"/>
CHARACTERISTIC 3	<input type="text"/>
CHARACTERISTIC 4	<input type="text"/>
CHARACTERISTIC 5	<input type="text"/>

12 **Name two strengths and two weaknesses (real or perceived) of the action?**

STRENGTH 1	<input type="text"/>	STRENGTH 2	<input type="text"/>
WEAKNESS 1	<input type="text"/>	WEAKNESS 2	<input type="text"/>

13 **Name three reasons why your audience will take the action you propose. Think about the benefits your audience will gain from doing so.**

These are not necessarily your three messaging points.

REASON 1	<input type="text"/>
REASON 2	<input type="text"/>
REASON 3	<input type="text"/>

Step 4: Complete the message triangle

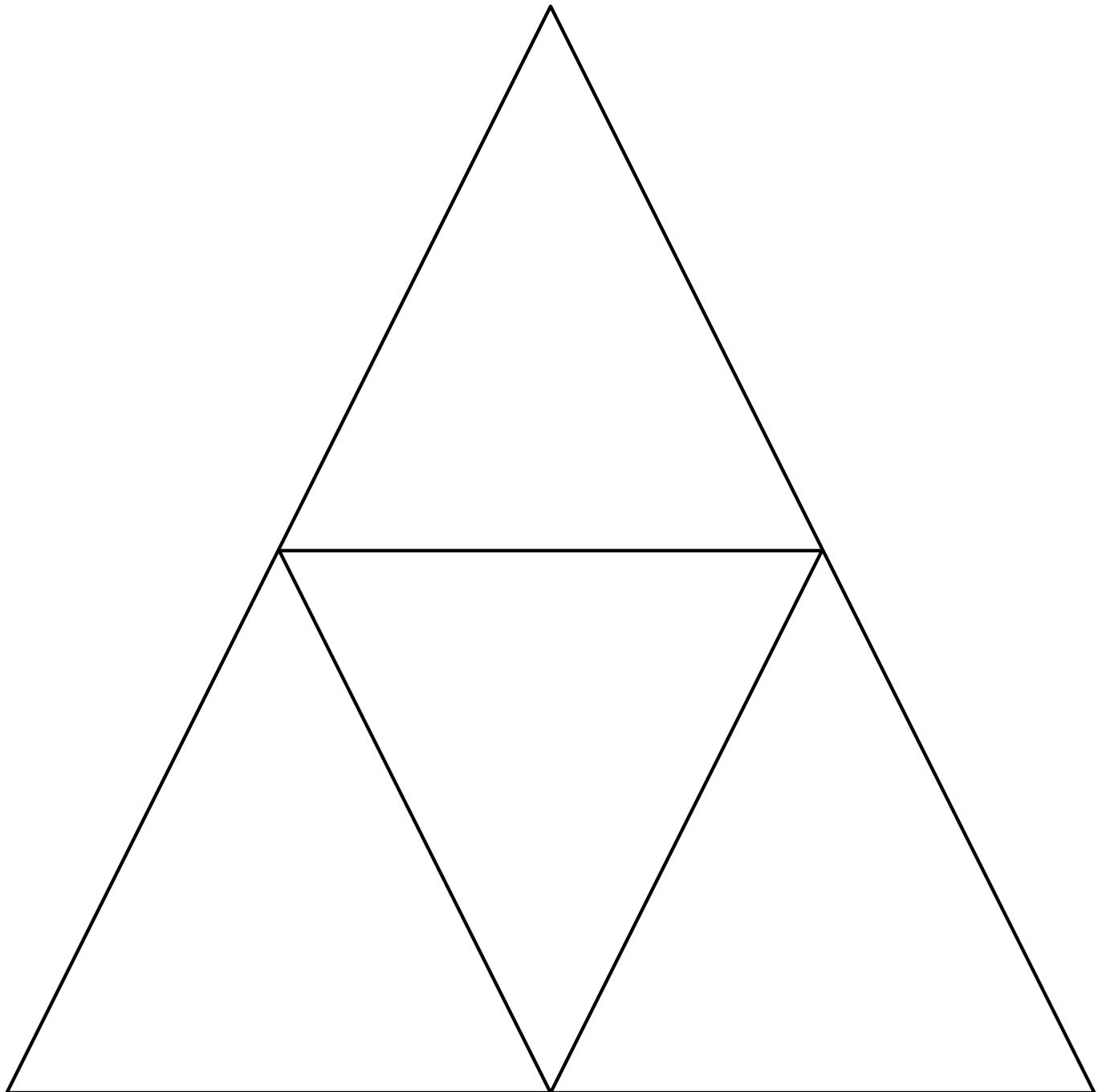
Now you are ready to complete the message triangle on your own or as part of a group exercise.
(See instructions below for facilitating the group exercise.)

Completing the message triangle as a group exercise

1. Have participants write down one or two messages: one or two things you might say to get someone from the audience to take the desired action.
 2. Ask each person to share their best messages.
 3. As ideas are shared place them on the triangle clustering similar ideas and set aside any that don't seem to fit.
 4. Ask if anyone has additional messages that are different from those that have been shared.
 5. Ask the group if any of the messages on the triangle or set aside might be our central theme? If there is agreement move that message to the center.
 6. Review messages that were set aside. If message seems important, place them on the triangle with the set of messages that seem to best fit.
 7. Divide into three groups. Give each group the cluster of messages from the triangle and have them write a single message that encapsulates those ideas.
 8. As a group create or revises the central theme so it fits with the three messaging points.
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Fill in your three message points and unifying theme, taking into account your work from Steps 1 through 3.



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Step 5: Test and refine

Crafting a good message is an iterative process. Make your messaging stronger by trying it out with both the audience you are trying to reach and the volunteers and others that you are relying on to convey the message.

Related point from message triangle	Source of feedback	Strengths of message	Weaknesses of message

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How and when will you test the message with your target audience?

15

How and when will you test the message with the people who will convey your messages?

Note: If it is not practical to test your messages pre-season, determine ways to track responses during the season. You might even test variants on the message.