



COMMUNICATIONS & CONTENT AUDIT

Canadian Property Tax Association (CPTA)





VISION

To define the future of
"communications for a cause"

MISSION

To ignite client success
through changemaking
writing and communications

VALUES

Setting the **PACE**:
Personality, Adaptability,
Courage, Excellence

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THE CHALLENGE

The Canadian Property Tax Association (CPTA) has engaged PFS Communications to conduct a review and re-imagining of their primary communications and marketing activities. The aim of this project is to not only identify existing gaps or challenges and improve the overall output, but to usher in new opportunities to expand the reach and engagement of their content, and – ultimately – grow and deepen their relationship with the membership.

The CPTA Executive pre-identified the following priorities during the initial consultation with PFS, providing a general framework for how this challenge would be addressed, the types of solutions that would be recommended and the roadmap for how the CPTA's vision would be brought to life with purpose and new possibilities for the future:

- Mobilizing **marketing and promotions** to raise awareness about the organization and its benefits;
- Building profile around **events and activities**, including workshops, seminars, networking events and social gatherings;
- Fostering **a sense of community and loyalty** by showcasing member benefits, enhancing communication channels and growing engagement; and,
- Exploring **new collaborations and partnerships** with organizations or businesses that share similar goals or target audiences.

THE OPPORTUNITY

Organizations like the CPTA are an important outlet for professionals within a particular industry to connect with each other, grow their skills and expertise, accelerate their careers and contribute to the betterment and advancement of their field overall through the provided resources, events, activities and professional development opportunities. But this “engaged ecosystem” is **only possible with a high-functioning communications infrastructure and a sustainable content strategy.**

By providing members with a consistent source of valuable content and resources and mutually beneficial opportunities to nurture and apply their growing expertise — regardless of the scale — they become your greatest asset. They will provide a reliable source of third-party promotion, participation and engagement, and will be your strongest word-of-mouth referral among their colleagues and professional networks.

With more than 400 members strong currently, and thousands of existing and incoming professionals across Canada who have yet to be engaged and to join the community — including corporate property tax officers, lawyers, tax consultants, and government officials — the landscape is primed for the CPTA to achieve significant growth in both engaged membership and industry impact. However, there is **work to be done to create the type of communications and content required to achieve this “engaged ecosystem.”**

THE PROJECT

To take advantage of the significant opportunity currently facing the CPTA, PFS mobilized a two-phased project to support the team in enhancing and elevating its communications channels, content and processes:



COMMUNICATIONS & CONTENT AUDIT

In addition to the learnings and insights shared via the CPTA team during the initial consultation, PFS took a comprehensive look at the overall existing communications landscape while also going in-depth on individual channels to provide a more detailed assessment of the efficacy of the organization's presence and outreach.



STRATEGIC COMMUNICATIONS

Based on the findings of the communications and content audit, PFS generated a catalogue of strategic recommendations for tasks, deliverables and opportunities that will help bring best practice and innovation to the CPTA's communications and usher in their next generation of growth in innovation and engagement.

THE AUDIT

To fully understand and appraise the CPTA's existing communications and content strategy, and to best establish the framework upon which recommendations will be built, PFS reviewed and assessed a complete array of the organization's output and activities while engaging with members of the board leadership to collect insight into specific and vital topics.

The audit centered on the following focus areas:

- **Channels** - PFS evaluated the organization's primary communications channels and vehicles, including email marketing (with particular focus on the email newsletter), social media (with particular focus on LinkedIn), and the website.
- **Content** - PFS evaluated the organization's overall key messaging and content delivery across all channels, and assessed the value, variety, volume, tone and effectiveness of the output based upon the target audiences the organization is intending to reach.
- **Collaborations** - PFS evaluated the organization's active and potential partnerships with key stakeholders from a communications perspective, including the CPTA regional chapters and other external entities.
- **Competition** - PFS comparatively evaluated the organization's current output and activities against similar professional organizations—both within the industry (i.e., The Institute of Management Accountants and International Property Tax Institute) and more broadly (i.e., International Association of Business Communicators and Association of Fundraising Professionals)—as well as against other pace-setting brands.

THE RESULTS

Through the communications and content audit, the number of high-level gaps and challenges were identified to capture the overall state of the CPTA's communications and allow for targeted improvements to be ushered through on a relatively rapid timeline. Please note that, while many specific notes were made regarding suggestions or changes at a more granular and detailed level, only the most critical challenges have been highlighted here in order to maximize the value and impact of this audit.

The identified gaps and challenges include:

- Lack of meaningful social media profile and engagement among existing membership as a result of minimal use and an inconsistent content strategy.
- Existing member newsletter is ineffective in its current format and misaligned with contemporary best practices for publications of this kind.
- Limited pathways for prospective members to join the community with no dedicated outreach or content aimed at enticing and engaging these potential contacts.
- Diversity, volume and value of output overall has been impacted by current cultivation challenges, a limited content pipeline and overall capacity.
- Minimal spotlight on regional chapters or member contributions is hindering awareness and likely uptake of this more personalized level of member participation.
- Lack of clear, consistent and comprehensive messaging overall about the organization, activities and particularly member benefits.
- Absence of foundational planning documents or brand "building blocks" to assist in the development and implementation of a proper content strategy.

THE RECOMMENDATIONS

To address the identified gaps and challenges and lay the foundation for future growth while reflecting the guiding focus areas of the communications and content audit, PFS has put forth strategic recommendations categorized under the following focus areas:



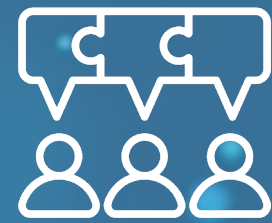
CHANNELS

Enhancements to the infrastructure through which the CPTA communicates and engages with its target audiences, including email, social media and website.



CONTENT

Strategies to increase and diversify content for the CPTA's primary communications vehicles and ensure its meaningful and consistent delivery.



COLLABORATIONS

Methods for nurturing partnerships with internal and external stakeholders to expand content and open possibilities for future communications evolutions.

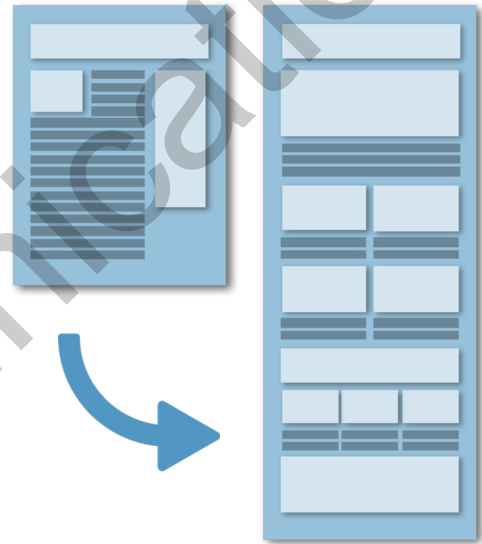
THE RECOMMENDATIONS: **CHANNELS**

1) EMAIL NEWSLETTER

1

Create a new, more visually appealing and accessible layout of the bi-monthly member e-newsletter in a user-friendly, pre-packaged email marketing and CRM platform.

The extensive functionality of platforms like MailChimp (which is currently in use by the CPTA) provides the creativity, interactivity, accessibility and personalization needed to create a superior user experience. A new layout using this platform will provide new possibilities for engagement, meet the technological expectations of incoming generations of professionals and demonstrate the CPTA's commitment to being forward thinking and innovative. An alternative PDF version could still be temporarily maintained for more traditional audiences and slowly sunsetted with time.



2

Change the name of the publication to more creatively encapsulate the CPTA's vision, the intention of the communication, and build brand awareness and affinity among members.

With a newly reformatted email newsletter (see Channels 1.1), a new name allows the CPTA to create a "rebranding" milestone that will draw new attention and readership to the publication among existing and potential future audiences. A new name could be simple and straightforward, such as the *CPTA Pulse Check*, or make creative use of industry terms, such as *The Assessment*, *The Appraisal* or *Fair Market Monthly*.

THE RECOMMENDATIONS: **CHANNELS**

3

Host all content via website to reduce overall copy in the email newsletter and drive an organic increase in website traffic while connecting users to other CPTA content.

By making the publication a vehicle instead of the destination itself, the email newsletter (and the content it contains) will not only be easier to navigate and consume, but will also allow users to only engage with the content they want to and that is deemed most valuable to them. With the newsletter intrinsically connected to the website, it also creates a repository of content that can be viewed long after publication and packages the content within the overall CPTA architecture and provides avenues to discover other content they may be interested in. This method of delivery also enables an additional, non-deadline driven vehicle for communications, where (as with social media) content can be shared at any time.

4

Use enhanced analytics via a MailChimp-hosted email newsletter (see Channels 1.1) to drive continuous improvements for both the publication and the overall communications and content strategy.

Actively analyzing key email analytics such as open rates, click rates and general usage and demographic data (which is collected and organized through the email marketing platform itself) will allow the CPTA to curate future content by identifying which topics and themes readers engage with and which they do not (among other important learnings like the best dates and times to deploy). These metrics and their associated user data will also enable the organization to further refine the larger email list with tags and segments, enabling targeted communications to an even greater degree (see Channels 2.1). Beyond email marketing, these insights into user preferences and activity will help to further focus the CPTA's content across all channels.

THE RECOMMENDATIONS: **CHANNELS**

2) EMAIL MARKETING (GENERAL)

1

Create a range of personalized member experiences by segmenting the complete email list using key audience identifiers or based on their specific relationship to the CPTA.

By categorizing your contactable audience by age, location, level of seniority, industry sector, chapter membership, event attendance record or via the groups listed in the recommended Content Matrix (see Content 1.3), the organization can develop targeted email outreach with content specific to their needs and interests while not inundating their inboxes (and also supporting Content 2.2). Email audiences can also be segmented by their usage data, helping identify who engages most or who has lapsed, and opening the doors to capitalize on or repair those relationships. These segments can be easily built and maintained through the MailChimp platform.

2

Diversify CPTA email marketing activities and build broader engagement by employing topic-specific campaigns in the gaps between the existing bi-monthly email newsletter.

Members of any professional organization can expect to receive emails from between one to four times per week, and while they may not engage with every outreach, this level of communication is important to maintain a more all-encompassing feeling of community. By adding regular email communications, or “bridges,” focused specifically on job postings, upcoming events, industry updates or other limited campaigns, and sometimes targeted based on the segments referenced in Channels 2.1, the CPTA can ensure it remains front-and-centre with audiences through regular, ongoing touchpoints. These bridge emails would be charted through the recommended Content Calendar (Content 1.4).

THE RECOMMENDATIONS: **CHANNELS**

2) EMAIL MARKETING (GENERAL)

3

Cultivate a prospective member email list to create a new contactable audience tier and prime them for conversion to CPTA membership through a dedicated, long-term engagement strategy.

Use free resources or incentives such as recorded webinars, access to white papers or event discounts promoted through social media (and the strategy referenced in Content 1.7) to garner interest from industry professionals who are not yet CPTA members. By creating this first touchpoint and receiving their contact information, the opportunity arises to connect with them via a series of targeted ongoing emails showcasing the organization, benefits, opportunities to participate and even feedback from existing members (without encroaching on unique member benefits or communications). These prospective member emails can be collected via an online submission form built and deployed through MailChimp and hosted on the website (see Channels 4.4). This list can also be further segmented based on what their sign-up was in response to or by allowing them to use the sign-up form itself to indicate their specific interests.

4

Design a customized new member email journey aimed at welcoming recently acquired members to the CPTA community through a series of meaningful touchpoints introducing all aspects of the organization.

New members require the most attention at the outset to keep them engaged and tapped into the reasons they signed up in the first place. By implementing an ongoing series of emails welcoming them to the CPTA—first with a general introduction (including a video message from a leadership member) and followed by weekly messages introducing various resources they now have access to as members—they are more likely to maintain a high level of engagement and affinity throughout their membership and even provide a potential source of future volunteerism.

THE RECOMMENDATIONS: **CHANNELS**

3) SOCIAL MEDIA

1

Reframe the CPTA's LinkedIn as the organization's primary, public-facing social media communications vehicle and prepare the channel for a significant increase in output and, as a result, activity and traffic.

To ensure potential new audiences are met with the best possible impression of the organization when visiting the channel, the following updates should be implemented prior to any increase in output via the strategy reference in Content 1.7:

- Update main "About" description to include references to the membership and the high-level benefits of being part of the CPTA (see Content 1.1 re: key messaging recommendations).
- Publish at least six to ten general posts over an approximately week-long timeline to ensure feed does not appear lacking in content or that the channel is not being used.
- Update cover photo to better align with the CPTA's brand message (see Content 1.1 re: imagery recommendations) and integrate the tagline into the description.

2

Implement a consistent schedule of social media content delivery to foster trust and reliability for target audiences and ensure CPTA is an active participant in the online conversation.

A simple but significant way of increasing social media engagement is through an increase in overall output. With a greater ongoing presence, it is more likely for the organization's content to be fed to potential new contacts. Though content type and frequency is referenced in Content 1.7 and 1.4 respectively, a general rule of thumb is to post content every one to two days at least, whether it is net new content, a repost from another page or member, a general industry tip, a news item or even a call-back to a past event or previously posted content.

THE RECOMMENDATIONS: **CHANNELS**

4) WEBSITE

1

As with Channels 3.1, prepare the CPTA website for a significant increase in activity and traffic as a result of greater overall communications output through several key updates and edits.

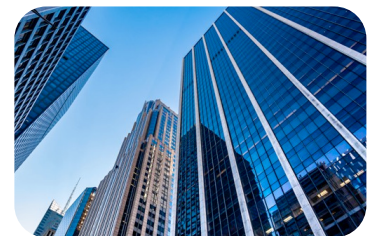
To ensure potential new audiences are met with the best possible impression of the organization when visiting the channel, the following updates should be implemented as soon as possible:

- Update the Mission & Vision block on the homepage to include references to the membership and the high-level benefits of being part of the CPTA (see Content 1.1 re: key messaging recommendations).
- Post six to ten individual articles, blog posts or events on the website news feed to ensure it does not appear lacking in content or that the website is not being used. This content can be pulled as individual articles from previous issues of the bi-monthly email newsletter.

2

Revise the website's primary imagery to better reflect the CPTA's brand, the industry it represents and the experience it aims to cultivate for its members.

In alignment with the imagery recommendations in Content 1.1 (and the examples at right), the website should visually portray a realistic and relatable interpretation of the organization's activities. Natural landscapes (as with the main homepage image) or overly edited or staged stock photos (as with the news content hero images) should be avoided and replaced with images of diverse professionals engaging with each other, actively working, or of actual property and real estate.



THE RECOMMENDATIONS: **CHANNELS**

3

Create more prominent real estate on the CPTA homepage to showcase featured initiatives, campaigns, events, chapters or news and engage visitors in specific opportunities to get involved with the organization.

To balance the general information on the homepage (i.e., the main description or the primary benefits), space should be made up front to promote specific and timely content that is of strategic importance to the CPTA and serves as a proof point for the value of becoming a member. This can be achieved in a number of ways, however the least intrusive methods would be to either:

- Convert the header image to a slider function that allows for multiple calls-to-action to be featured simultaneously; or
- Moving the news feed and event listing to “above the fold” right beneath the header image while adding additional buttons directing visitors to the About page or membership benefits to ensure this vital information is not buried.

4

In support of Channels 1.2, integrate a MailChimp-hosted “Join Our Email List” function to collect valuable contact information for new users interested in the organization and its activities.

This tactic has been specifically highlighted as an email sign-up function is critical to the growth of the organization’s email marketing activities, passively building the CPTA’s audience and potential membership. The main sign-up form can be built through the MailChimp platform, and can exist as either its own standalone landing page or be embedded into the website (preferred). The form should allow users to indicate their preferences for the type of content they are most interested in (i.e., events, job postings, industry news, etc.), providing valuable insight for the email strategy from Channels 2.1 and 2.2 to be implemented.

THE RECOMMENDATIONS: **CONTENT**

1) CONTENT STRATEGY

1

Review, refine and solidify organizational brand, key messaging and visual standards to lay a foundation for consistent application across all channels and integration with all content delivery.

A solid and clearly understood brand identity that is easy to recognize and apply is a vital building block for any organization. While there are standard messages apparent through the CPTA's communications and content, it is important to constantly be revisiting how the organization is portraying itself to its audience and how it can keep up with a constantly changing landscape. The following are key areas worth highlighting in the immediate to improve the overall application of the brand:

- **Member Focus:** Though the tagline "Bringing property tax professionals together" is a suitable representation of the CPTA's aim, there should be a greater focus on this messaging throughout. The audience always comes first in communications, so all content should place primary focus on answering the question, "What is in it for the members?" (i.e., by simply revising "...providing a forum for the exchange of ideas..." to "...providing property tax professionals with a forum for the exchange of ideas...").
- **Unique Benefits:** The list of benefits available to members should be as extensive as possible to provide adequate incentive for prospects to join. In addition to what is currently listed, the following are examples of benefits that should also be featured prominently:
 - Access to member-only events as well as discounted rates on premier CPTA events and conferences (including the Annual National Workshop);
 - Engagement with other property tax professionals in your direct area through the CPTA's regional chapters;
 - Exclusive career opportunities initially made available only to members via CPTA member organizations.
- **Imagery Choices:** As referenced in Channels 3.1 and 4.2, all imagery (whether on the website, in an email or accompanying a social post) should visually portray a realistic and relatable interpretation of the organization's activities. Images should feature crisp, blue-and-grey hues, and highlight either professionals in a networking or collaborative setting or modern architecture and real estate. It should not feel posed or have the subjects should not be looking straight into the camera, and instead feel natural and "in the moment."

THE RECOMMENDATIONS: **CONTENT**

2

Chart a Content Pipeline outlining all existing and potential sources as reference for content planning as well as to help identify gaps where new or untapped sources can be capitalized upon.

A high-level Content Pipeline will ease the content planning process (and support the long-term management and maintenance of the Content Calendar referenced in Content 1.4). This ever-evolving reference document provides a valuable overview of pre-identified sources to tap into for potential content and a checklist of questions and items to consider that will guide ongoing content collection and curation efforts—with the overall intention of making “out-of-the-box” content easier to locate and mobilize.

[CLICK HERE TO VIEW SAMPLE CPTA CONTENT PIPELINE](#)

3

Create a basic Content Matrix outlining all primary target audiences and all primary channels and identifying the most appropriate and meaningful topics relevant to each communication opportunity.

In conjunction with the Content Pipeline (see Content 1.2) and the Content Calendar (see Content 1.4), the Content Matrix provides the organization with a strategic lens into how best to target specific audiences for the purposes of fostering deeper engagement. This reference document takes much of the “guess work” out of content curation by focusing content strategy for each audience segment around the content that they will most resonate with and is most likely to foster their engagement with the CPTA.

[CLICK HERE TO VIEW SAMPLE CPTA CONTENT MATRIX](#)

THE RECOMMENDATIONS: **CONTENT**

4

Develop and employ an editorial Content Calendar to assist in the planning of content delivery aligned with communications strategy, across channels and with notable or timely campaigns or milestones.

A long-term, omni-channel Content Calendar is one of the most important tools any organization can employ as part of their communications and content strategy. Not only will this allow the CPTA to guarantee consistent and cohesive content delivery, but will ensure all audiences are addressed and spotlighted over a 12-18 month timeframe (with particular focus on an equitable distribution of content from regional chapters) and that communications are purposeful by aligning messaging and campaigns with important times of year from an organization, industry and general audience perspective (i.e., key events, property appeal deadlines or major Canadian holidays).



[CLICK HERE TO VIEW SAMPLE CPTA CONTENT CALENDAR](#)

THE RECOMMENDATIONS: **CONTENT**

5

In support of Content 1.2, integrate public-facing industry news into the CPTA content pipeline and position the organization as a valuable ongoing outlet and venue for expert discussion and insight.

This tactic has been specifically highlighted given that any member responsible for content creation or curation should be set up with one or multiple industry-specific Google Alerts to be able to quickly join the conversation around news or updates as they happen. While the CPTA would not need to render an opinion, depending on relevancy, this content could be posted as is or be framed in a way as to foster discussion from members with the organization as the arena (using the website if comment function is available or, more likely, via social media).

6

In support of Content 1.2, capitalize on member-driven content to feed the CPTA content pipeline and deliver upon a key membership benefit with greater profile and professional development.

This tactic has been specifically highlighted given that, by providing members with greater opportunity to showcase themselves and their expertise through official CPTA communications, they are more likely to advocate on the organization's behalf and amplify its content. For example:

- Building off of the "Taxing Questions" feature in the existing email newsletter, create more robust member profiles that can be hosted on the website and creatively reshared via social media with their subjects tagged (and therefore visible to their extended professional networks) - also see Content 2.2.
- Allow members to either submit their recent achievements or accolades (or identify these internally as part of the Content Pipeline) and, depending on their size and scale, showcase these via the CPTA's official channels.
- Encourage members to generate and submit their own content (either focused on the industry or the professional space in general) for vetting and publication via the organization channels, providing them with potential profile among the membership.

THE RECOMMENDATIONS: **CONTENT**

7

Activate an aggressive social media strategy to jumpstart engagement among existing CPTA members and cultivate greater awareness of the organization among industry professionals and potential new members.

Recognizing that an increased, consistent output is required if the CPTA hopes to expand its social media footprint and elevate its reach and engagement (as referenced in Channels 3.2 and Content 1.4), there are simple tips to follow in both output and outreach in order to maximize the impact of these efforts:

Output:

- Tag organizations or individuals whenever possible to encourage content shareability (particularly those with significant profile or following);
- Repost existing content from other LinkedIn accounts (after vetting for accuracy and relevance);
- Encourage discussion and the sharing of insight by specifically crafting content with this in mind (i.e., "Share your thoughts in the comments below.");
- Ensure all events and job postings (if available publicly) are loaded into the LinkedIn channel as such in order to reach users who may be interested;
- Focus on visually engaging content whenever possible by including images or graphics (i.e., quotes or quick tips should be branded and formatted to encourage shareability, while data should follow an infographic style).

Outreach:

- Curate a list of industry- and organization-relevant #hashtags to follow, providing an additional source of content (see Content 1.2) that can be easily engaged with or reposted to the official group;
- Ensure member organizations or potential content sources are being followed by the CPTA LinkedIn channel to enable easy engagement;
- React and respond to relevant posts (either from members or organizations, or in searching specific topics and #hashtags) as the CPTA specifically;
- Join relevant professional LinkedIn groups (either as CPTA or via leadership members) to keep a pulse on existing conversations, joining in when possible, and promote content or initiatives with pre-engaged audiences;
- Conduct regular people searches for industry professionals and, if not connected to the CPTA LinkedIn group (whether existing member or not), invite them to follow;
- When an industry professional who does not have a previous relationship to the CPTA is identified via LinkedIn, conduct personal outreach from the LinkedIn channel itself to organically introduce them to the organization.

THE RECOMMENDATIONS: **CONTENT**

2) OUTREACH CAMPAIGNS

In addition to strategies listed throughout these recommendations, the following are examples of specific introductory campaigns that could be implemented to reach new audiences, engage prospective members, embolden the existing membership and elevate the online profile of the CPTA.

1

Drive interest in CPTA membership among industry professionals in Canada with paid digital advertising campaigns on LinkedIn during the most opportune times of year.

Through a series of creatively branded paid advertising campaigns focused on encouraging specific users to learn more about the CPTA and specifically highlighting member benefits, it would be possible to cultivate an increase in followers, engagements and even successful membership conversations. LinkedIn's targeting capabilities allow for the organization to specifically hone in on industry professionals at specific ranks across Canada (or by region). The campaigns could run for 3-4 weeks every 3-4 months, with particular focus on the fall (when vacations end and newly graduated students begin their career searches) or in late spring (far enough from expensive holidays but before most sign off for the summer). An investment of approximately \$500-\$1,500 per campaign (depending on the target audience, intended call-to-action and the method of delivery - [click here for more information](#)) would provide enough data to evaluate the efficacy of these campaigns and determine if and how these paid ads would continue to be used.

THE RECOMMENDATIONS: **CONTENT**

2

Creatively package and communicate member profiles and/or testimonials to capitalize on the increased reach of each individual's professional network while building affinity with existing members.

In tandem with Content 1.6, these “member spotlights” could be coordinated as part of an organic campaign across all channels and based around similar annual intervals as referenced in Content 2.2. Highly engaged members nationally and from every chapter could provide statements about why they chose to join the CPTA or the most valuable part of being a member, with these shared to the broader audience in hopes of enticing them to learn more. By using specific people, there is also potential for recognition among their colleagues and peers, bolstering the reach and impact of a campaign such as this.

3

Build a suite of employer-specific promotions, resources and opportunities to cultivate relationships with key organizations and work through them to build potential membership.

With compelling informational pamphlets, exclusive webinars or even meet-and-greet events run through the regional chapters (see Collaborations 1.1), or the promotion of existing bulk registration discounts, the CPTA can empower prominent industry employers with a toolkit that invites them to be active partners in building the potential of the organization. This ongoing campaign allows the CPTA to connect directly with industry leaders (either through LinkedIn or direct email outreach) and empower them to become advocates among their employees, while hopefully also putting the organization front-and-centre with these professionals themselves, complementing and pushing beyond the bounds of digital communications.

THE RECOMMENDATIONS: **COLLABORATIONS**

1) CHAPTER ENGAGEMENT

1

Create a role within each of CPTA's regional chapters for an individual member to source, generate and share targeted content and elevating profile for the chapters both internally and externally.

By identifying and engaging liaisons or ambassadors within each of the regional chapters (from outside of their board leadership), the organization can provide a unique opportunity for highly engaged or ambitious members to play a more significant role in the development of their chapter the CPTA as a whole. These individuals represent valuable streams of content, providing in-roads into the chapter membership and additional capacity to cover events and other important initiatives that need to be shared via social media and other channels. These individuals could comprise a sub-committee of their own (led by a member of the CPTA national board), providing an additional level of professional development can collaborate and remain consistent in their efforts. If used effectively, these individuals and the additional capacity they represent can also be the catalyst for chapter-specific LinkedIn channels in the future.

2

Dedicate an equitable level of real estate, exposure and profile for each of the CPTA's regional chapters to ensure each is represented and the program overall cultivates adequate awareness.

While the organization overall provides a level of community, there is a unique benefit to members who are able to access a group of like-minded professionals within their geographic vicinity and who they can realistically access for networking, mentorship and collaboration. By engaging in long-term content planning that guarantees equal opportunity for each chapter to be featured across the national channels, empowering ambassadors (see Collaboration 1.1) to generate and share a sustainable stream of their own content and ensuring there is equal dedicated space reserved for them in email, on the website and on social media (via Content 1.4), the CPTA overall can achieve a much deeper level of engagement.

THE RECOMMENDATIONS: **COLLABORATIONS**

2) SPONSORSHIP

1

Explore and evaluate potential revenue-generating opportunities by defining and offering an array of paid content sponsorships through the CPTA's existing communications channels.

As the CPTA's membership continues to grow through these various recommendations and strategies, its audience and reach will also become a valuable outlet for industry-related brands, services and organizations to promote their own content to the membership. By creating progressive tiers of sponsorship depending on cost (with 2-3 tiers being most appropriate) and conducting targeted, small-scale outreach to specific partners to gauge interest in sponsored content opportunities via the CPTA website, LinkedIn channel and email marketing outreach, the organization can determine the viability of this program and whether or not it is worth it to grow. An alternative (or corresponding) option is to expand the CPTA's event sponsorship to create new virtual and in-person events (i.e., expert industry speakers, educational or development webinars, etc.) and secure sponsors for each, particularly if they are involved in the content of the event itself. Not only would this provide an additional revenue stream but also greatly expand and diversify the type of content, events, opportunities and benefits available to the membership.

THE NEXT STEPS

High-quality communications is a marathon, not a sprint. This is just the start of an immense evolution for the CPTA's communications and content, one that will improve the experience for the organization's growing membership.

The recommendations contained within this audit report represent interim improvements that can be implemented quickly and within the CPTA's limited existing capacity. As the organization gauges the success and learnings from implementing these recommendations, they can continue to expand on the foundation it has built by: providing more exclusive benefits and channels for members; creating specific channels and engagement opportunities for the CPTA regional chapters; capitalizing further on new content sources such as artificial intelligence (AI); and, ultimately, invest more in large-scale outreach and growth.

PFS Communications thanks the CPTA and the board leadership team for engaging in this project and starting an ongoing conversation around how excellence in communications and content can be achieved.

These expert insights and recommendations will help to bring your ideas and vision to life with purpose and new possibilities for the future—and PFS is proud to play a small part the CPTA's journey.

**THANK
YOU**

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