

# Strategic Communications Playbook

Research, Tools and Resources to Effectively Tell Your Story

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## SUMMARY

This Communications Playbook is designed to help organizations effectively communicate their sustainability efforts, not only progress and updates, but also challenges and possible setbacks.

It provides the data and tools needed to strengthen internal planning and collaboration as well as enhance external messaging for greater impact. By telling the full story and business case for these efforts, organizations can better demonstrate why sustainability initiatives matter to their bottom line and to consumers, employees, and investors alike.





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# Executive Summary

This Communications Playbook is designed to help organizations effectively communicate their sustainability efforts, not only progress and updates, but also challenges and possible setbacks.

It provides the data and tools needed to strengthen internal planning and collaboration as well as enhance external messaging for greater impact. By telling the full story and business case for these efforts, organizations can better demonstrate why sustainability initiatives matter to their bottom line and to consumers, employees, and investors alike.

**Organizations are encouraged to adapt this Playbook to fit their unique needs, goals, and company structure.**



Data shows that climate, environmental, and social efforts help an organization's bottom line. These initiatives [incentivize companies](#)<sup>1</sup> to reduce costs, increase efficiency, and mitigate risks—whether operational, reputational, or legal. They also help safeguard against future disruptions, particularly within the supply chain. It makes good business sense and should remain a key business strategy.

An organization's approach to and framing of this work will inevitably shift depending on:

**Internal Changes:**

Reorgs, leadership changes

**External Factors:**

Pace of technology change, shift in market/  
consumer demand, political climate

It is essential that organizations tell the full story of their sustainability efforts—not just their environmental impact, but also the business value, risk mitigation, and long-term resilience these initiatives create.

**Use this Playbook to communicate more effectively with your key audiences.**

The Playbook provides guidance in two key areas:

**Internal Processes:**

to enhance planning and collaboration

**External Communications:**

to craft messages and content tailored to diverse audiences

With proactive planning, you can navigate transitions confidently and maintain credibility during crises or periods of change. It also helps you avoid last minute scrambles or missed opportunities by laying the groundwork ahead of time.

This Playbook is for communicating commitments, plans, and results of work that has already been done. If the fundamental work has not been done, then there is no communications solution to cover for a lack of commitment, planning, and progress.

Consider sharing the [“Strategic Messaging”](#) section with your communications peers or anyone else at your organization responsible for communicating your efforts. Partnering with these key internal stakeholders will be critical to ensuring your success.

The Playbook should be first reviewed in order, as each section builds off one another. Subsequently, you should use it as a helpful reference. Included in the Playbook are resources and templates. Download and use them to help you with your efforts.

### For investors...

There is a [strong pro-climate bias](#), including Republicans, based on a 2024 Potential Energy Coalition study.<sup>2</sup>

### For consumers...

[N]early eight in 10 (78%) of consumers said sustainability is important to them when choosing a brand to shop from, according to a [2024 IBM consumer study](#). Additionally, 61% said they’d change their shopping habits if it meant helping reduce negative environmental impacts.<sup>3</sup>

### For business leaders...

[71 percent](#) of C-suite and functional corporate leaders surveyed now view environmental, social, governance (ESG) investments as a source of competitive advantage, according to a 2024 Thomas Reuters report.<sup>4</sup>

### For employees...

[75 percent](#) of human resources (HR) executives believe ESG strategies positively impact employee engagement, and 64 percent say ESG efforts positively affect their efforts to recruit with the necessary skills, per a 2023 SHRM ESG study.<sup>5</sup>

# Playbook Roadmap

The Playbook Roadmap provides a high-level overview of the communications planning process. It outlines seven clear steps, each linked to a specific section of the Playbook, along with its action and purpose.

Use the Roadmap as a reference point to orient yourself before exploring the tools, templates, and guidance provided throughout the document.



# Playbook Roadmap

STEP	ACTION	PURPOSE	RELATED SECTION(S)
<b>Step 1</b>	Learn What the Playbook Is and How to Use It	Build awareness of the issue and understand the full process before implementation.	<a href="#">Executive Summary</a> <a href="#">Current State</a> <a href="#">Setting Expectations</a>
<b>Step 2</b>	Understand Your Key Audiences	<b>Internal</b> Align internal teams, reduce confusion, and foster collaboration.  <b>External</b> Identify key stakeholders, tailor messaging, and ensure effective content use.	<a href="#">Stakeholder Mapping</a>
<b>Step 3</b>	Reframe and Tailor Your Messaging	Ensure relevance amid external changes and maintain consistency across communications.  Adjust tone and details to meet the needs of specific stakeholders.	<a href="#">Strategic Messaging</a>
<b>Step 4</b>	Refine Your Content and Choose the Right Formats	Assess existing materials for alignment with updated messaging, and explore effective formats and platforms.	<a href="#">Bringing Your Plan to Life</a>
<b>Step 5</b>	Finalize and Organize Your Communication Plan	Centralize messaging efforts for organization and efficiency.  Capture key planning information, such as strategies, tactics, and a content calendar.	<a href="#">Bringing Your Plan to Life</a>
<b>Step 6</b>	Anticipate Challenges and Map Potential Responses	Prepare for unexpected yet common challenges.	<a href="#">Scenario Planning</a>
<b>Step 7</b>	Regularly Review and Update the Plan	Adapt to evolving circumstances for continued effectiveness.	



# Current State

The rapidly evolving political landscape has created increasing pressures and challenges for companies seeking to address climate and social issues. At the same time, the physical climate risks continue to intensify, and the need to manage the social impacts of the low-carbon transition remains.

**Environmental, Social, and Governance (ESG) as a term has been co-opted and politicized and, therefore, should no longer be used.** Research shows it is confusing, divisive, and often unfamiliar to many stakeholders. To be effective, the work itself should be discussed in a way that resonates with key audiences, remains apolitical, and is integrated into an organization's core business strategy. Expectations for corporate sustainability performance have also evolved: while it was once enough to make bold commitments, organizations are now expected to develop credible plans to achieve those commitments and transparently demonstrate progress over time.



ESG as a term has been co-opted and politicized. While backlash emanates from multiple sources, the leading drivers are policymakers and political candidates at both the federal and state levels. Although politicization and backlash can complicate environmental and social efforts by reinforcing polarization and divergent views, they also present an opportunity to refine strategies, priorities, commitments, and communications.

**Companies should not stop the work but rather incorporate it into their core business and communicate its broad benefits in a way that resonates with what their stakeholders care about most.**

Building a strong business case highlighting these diverse benefits is essential to maintaining momentum and securing lasting support.

In general, we see that ESG is:

### Confusing

While 99 percent of S&P 500 companies issued ESG reports for their activities in 2023, no standard approach was used.<sup>6</sup>

### Divisive

Research shows that environmental and social initiatives can benefit businesses. Despite the data, perspectives on these initiatives vary. Policy priorities often shift with changes in administrations, and the degree of change can range from gradual adjustments to more extreme or significant shifts. Recently, changes in policy priorities at the federal level have affected climate regulations and funding for clean energy initiatives.

### Unfamiliar

Having an opinion on ESG is somewhat unusual, as 62 percent of Americans are “not too familiar” or “not familiar at all” with ESG, according to a 2023 Gallup survey, and 59 percent say they have no opinion on the topic. The same survey found 22 percent support the idea and 19 percent oppose it. Democrats are more likely than independents or Republicans to have a positive view of ESG (45 percent versus 20 percent and 5 percent, respectively), but most people in all three groups say they are unsure about their feelings on the topic.<sup>7</sup>

Given the current state, there are likely shifts in politics and policies (both internal and external) that will impact you and your work.

While the work and its importance remain, your approach will need to be tailored depending on your audience and environment.

# Setting Expectations

**Effectively communicating sustainability efforts is just as important as the efforts themselves.**

A strong communication strategy is built on credibility, authenticity, and preparedness. When done well, it not only builds trust but also drives deeper engagement with stakeholders across the organization and beyond.

It also helps manage expectations and reduces potential pushback by clarifying what is and is not within your control when the inevitable shifts in strategy or commitments arise. But communication can only be effective if it reflects real commitments and work.



## Who is this Playbook for?

This Playbook is designed for those who have done the work and need guidance in effectively communicating their commitments, plans, and results. “Doing the work” means setting clear goals, developing thoughtful climate strategies, implementing meaningful initiatives, and demonstrating progress over time. **If the foundational work has not been done, no communication strategy can compensate for a lack of commitment, planning, or progress.**

This Playbook helps sustainability professionals collaborate more effectively with communications teams. It should help both teams take a more comprehensive approach to the benefits of their work—extending beyond sustainability to areas such as job creation, improved efficiency, and more. It equips sustainability professionals with the knowledge and tools to proactively plan and navigate communication efforts, reducing the risk of rushed decisions or overlooked opportunities.

## Doing the Work

The landscape of corporate climate action has evolved significantly, with performance against established goals now taking center stage. With [7,200 companies](#)<sup>8</sup> having science-aligned emissions reduction targets, the bar has been raised beyond mere commitments. Today’s stakeholders expect organizations to disclose transition plans that detail specific actions for achieving targets, as well as other foundational elements such as capital allocation strategies, governance mechanisms, and communication of interdependencies. Without communicating these details, commitments risk being dismissed as “greenwashing.” Public assessments from organizations like [Transition Pathway Initiative](#),<sup>9</sup> [Transition Arc](#),<sup>10</sup> [Climate Action 100+](#),<sup>11</sup> [Carbon Tracker](#),<sup>12</sup> and [InfluenceMap](#)<sup>13</sup> are increasingly focused on measuring performance to evaluate plan credibility.

Plan indexing using the C2ES [Transition Plan Index](#)<sup>14</sup> is a disclosure best practice that can be used with the Playbook to communicate plan information and establish credibility. Once a plan is developed, elements should be indexed. Then the Playbook should be used to support communication on progress, shifts in strategy, and transparency on roadblocks. The Playbook complements standardized reporting and disclosure by providing the communication framework needed when plans inevitably evolve.

For a more in-depth look at transition planning best practices and recommendations, read the [“Corporate Low-Carbon Transition Planning: Best Practices & Recommendations to Support Credible Action”](#) report.<sup>15</sup>

It provides guidance on improving planning, transparency, and performance.

As you navigate this journey, recognize that no transition plan unfolds precisely as written. You will face situations requiring communication about missed targets or strategic pivots due to funding constraints, technological developments, or policy changes. You will also encounter external factors beyond your control that may create roadblocks to your work. This reality underscores why your climate goals must not change, but **plans should be adaptable to changing circumstances, stakeholder expectations, and market conditions**. As an organization, you will need to be nimble, responding in the moment to internal and external events and adjusting your communications strategy accordingly.

## Communicating the Work

Effectively communicating sustainability efforts is just as important as doing the work itself. In today's landscape, climate, environmental, and social initiatives are not just about reducing greenhouse gas emissions—they also drive business value, enhance efficiency, create jobs, mitigate risk, and strengthen consumer trust. By clearly articulating the full spectrum of risks and benefits, organizations can **build a stronger business case** for sustainability, securing internal buy-in and demonstrating value to investors, customers, and other key stakeholders. To further strengthen the business case, consider how your efforts align with the organization's mission, vision, and values. Clearly articulating this relationship will allow you to show the value of your efforts using language that resonates with your leadership.

Organizations are rarely in control of everything needed to achieve their climate and sustainability goals, which makes the proactive identification and communication of interdependencies of paramount importance. Interdependencies can include a policy needed to advance a project, the requirement for a new technology to become economically viable, or the availability of adequate finance to support needed upgrades or new technology adoption. Communicating interdependencies and how they are being addressed helps to build trust and shows that progress is dependent on a broader, often unpredictable landscape. This proactive communication helps manage expectations and reduces potential pushback by clarifying what is and is not within your control when the inevitable change in strategy or commitments must be communicated.

### RESOURCES

Transition plan content index and guidance

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Corporate Low-Carbon Transition Planning: Best Practices & Recommendations to Support Credible Action

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Navigating the Finance Sector Net-Zero Transition: Levers for Decarbonizing in a Complex Landscape

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But a business case alone is not enough: To build a foundation for effective communication, organizations must also prioritize **credibility, authenticity, and preparedness**. A credible organization can navigate changes with confidence, avoiding a defensive tone. Authenticity fosters meaningful engagement and enhances impact. And, preparation enables thoughtful and timely responses, whereas reacting impulsively or without planning—especially in a crisis—can lead to an unintended or negative reception.

Together, these practices of building a strong business case, communicating with credibility and authenticity, and staying prepared form the core of any successful communication strategy.

Download the resources below for tips on building credibility, communicating authentically, and aligning with your organization's mission, vision, and values. Incorporate these key communication principles as you develop your communication plan.

Without effective communications, even the most impactful initiatives risk being overlooked or misinterpreted, potentially leading to skepticism or accusations of greenwashing. The remainder of this Playbook is dedicated to helping you communicate your work.

#### RESOURCE

Tips for credibility building and authenticity

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Guidance to ensure alignment mission, vision, and values

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# Stakeholder Mapping

**One of the first steps in any communication effort is identifying the “who.”** Who do you need to work with internally to be successful? And, who do you need to target externally to get your message out?

Spending time upfront identifying your internal stakeholders and external audience will allow you to prioritize, tailor, manage, and enhance your overall efforts.

Understanding your audience lays the foundation for crafting relevant messages and using the right channels. And, stakeholder mapping helps expedite planning and decision-making by aligning the right people and processes from the start.



While stakeholder mapping is often viewed as an external planning exercise, it's **equally important to apply this process internally**. Too often, organizations operate in silos, divided by region, function, or hierarchy. These divisions hinder the collaboration needed to effectively communicate planned efforts and respond to unplanned incidents.

Spending time upfront on stakeholder mapping will help you:

- 1 Identify and understand your internal and external stakeholders**
- 2 Prioritize your engagement efforts**
- 3 Tailor your communications**
- 4 Manage expectations and risks**
- 5 Build stronger relationships and collaboration**
- 6 Increase accountability**
- 7 Improve decision-making**
- 8 Enhance overall performance**



# Internal Stakeholders

A common challenge organizations often encounter is a lack of alignment between teams, including sustainability, communications, investor relations, and legal.

While all are working toward the same organizational goals, each department has its own priorities, responsibilities, processes, and even jargon. What motivates and concerns legal or communications may differ significantly from what drives sustainability.

## Key questions to ask:

- Who are the decision makers at your organization?
- Who needs to be consulted or informed of pending decisions?
- What is the communication team's approvals process and lead times?
- What's the best way to collaborate with your peers?

Since every organization has its own structure and requirements, it is essential to identify key stakeholders early and ensure alignment from the start. Failure to do so could mean lost opportunities or missed timelines when communicating about your work.

# External Audience

## Key questions to ask:

- Who do we need to reach and why?
- What issues resonate with them?
- What factors (e.g., cultural, political) influence them?
- What is the most effective way to engage them?

When communicating about your climate, environmental, and social efforts, the target audience typically includes investors, customers, employees, community members, regulators, and industry peers. Each group has different concerns and expectations, so tailoring communication to each specific audience is crucial.

Use the templates provided to capture your internal and external stakeholders. As the template explains, you will need to share your communication method with your internal stakeholders to ensure alignment and incorporate feedback before finalizing it.

## RESOURCES

Stakeholder mapping templates

# Strategic Messaging

**Once you have identified your ‘who,’ it’s time to consider the ‘what.’** What key messages do you need to communicate to your audiences? Which messages will resonate most and drive the greatest impact? How can you control the narrative and tell the complete sustainability story in today’s complex, ever-changing, and fast-paced environment? Effective messaging should be clear, authentic, and aligned with both business priorities and public sentiment.

This section provides key guidelines for developing both core and tailored messages that will serve as the foundation of your communications strategy. These guidelines should be applied thoughtfully, depending on the situation, audience, and communication channel. It’s also important to remember that messaging is not static. What resonates today may shift tomorrow, so ongoing evaluation and refinement are essential.



## The Need to Reframe

You must reframe your messaging to meet the moment, telling the full story by highlighting the wide range of benefits—not just the climate impacts—of your work. Otherwise, you risk losing control of the narrative or missing the opportunity to connect with key audiences. Consider external factors such as policy and regulatory changes, cultural shifts, and evolving consumer and investor preferences when developing your talking points. The following are key guidelines to consider:

### Use Plain and Relatable Language

Over time, experts have unintentionally alienated broader audiences by using increasingly technical language, acronyms, and jargon. To better connect with the public, use plain, tangible language. For example, instead of discussing the need to combat climate change, focus on extreme weather. Tailor your message to the audience. For example, ‘In [state], we’ve experienced more days of extreme heat than ever before.’ People relate to visible changes in their communities, like extreme heat, wildfires, or floods. This approach makes the issue feel more immediate and less political.

### Here are other examples of ways to avoid climate jargon and use clearer and more familiar language:

FROM	TO
Protecting biodiversity	<b>Protecting plants, animals, and their habitats</b>
Multi-stakeholder capitalism	<b>Considering everyone who depends on our business</b>
Supporting the circular economy	<b>Reducing waste and recycling more</b>
Managing water stress	<b>Using water responsibly</b>

When you simply replace “climate change risk” with “climate risk,” [25 percent more investors](#)<sup>2</sup> are likely to agree it’s an “important risk” for financial services firms to evaluate. This change simplifies the phrase, makes it less polarizing, and moves investor agreement from [42 percent to 52 percent](#).<sup>2</sup>

## Build the Business Case

One key lesson<sup>16</sup> is that framing sustainability as a driver of cost savings, job creation, and personal health resonates more with the American public than abstract appeals to combat climate change and protect natural resources. Emphasizing these broader benefits not only makes sustainability less political but also better aligns it with business objectives.

Part of building an effective business case also involves highlighting risks. There are clear physical and financial risks that consumers and investors believe companies need to act on.<sup>2</sup>

PHYSICAL RISKS	FINANCIAL RISKS
Trade disruptions	Rising costs of insurance
Threatening weather	Volatile energy costs
Decreasing availability of land	Cost of land
Important resources and raw material	Cost of dwindling raw materials
Damage to plant and equipment	Supply chain disruptions

7 in 10

**consumers**

surveyed agree that businesses face significant climate-related risks that could negatively impact their financial performance.<sup>2</sup>

### EXAMPLE

General Motors (GM) positions its electric vehicles as an eco-friendly and affordable choice, which is also driving growth. GM's EV strategy emphasizes affordability and job creation, offering a clearer, financially appealing picture of sustainability.<sup>17</sup>

## Reframe Climate Risk as Responsible Business

Data shows that a very simple reframe away from ESG to Responsible Business has a much better public perception and is far less polarizing.

8 in 10  
consumers

believe “responsible businesses” are more likely to succeed financially.<sup>2</sup>

[Research](#) shows that Republicans tend to think “responsible business” is a conservative term, Democrats tend to think it’s a liberal term, and Independents think it’s a moderate term. This broad appeal highlights how ‘responsible business’ serves as a unifying concept that resonates with Americans across the political spectrum, regardless of party affiliation.<sup>2</sup>

[Research](#) indicates that chief communications officers across the board think that “responsible business” means prioritizing profit while also benefiting the environment and employees. It was also found to have strong connections to financial success across the political spectrum.<sup>18</sup>

## Focus on Innovation

Framing sustainability initiatives as a natural extension of innovation and progress can help businesses align with today’s priorities. While the ultimate outcome is increased sustainability, emphasizing technology and advancement makes the issue less likely to be perceived as politically divisive or solely driven by environmental activism.

[Research](#) shows that “clean energy technology” scores higher with investors than simple “sustainable investing.” The word “technology” helps anchor the conversation around innovation and invention, further emphasizing the upside.<sup>2</sup>

### EXAMPLES

Microsoft [highlights](#) how they accelerate sustainability through artificial intelligence (AI), and how these innovative advancements can drive efficiencies, business growth, and optimization.<sup>19</sup>

[Unilever is leveraging AI](#) to drive innovation, increase efficiency, and advance environmental goals.<sup>20</sup> “By [bringing together the very best in technology](#), data and people, we are identifying needs and trends and transforming them into sustainable, cutting-edge innovations across our business,” said Neil Parry, Head of Biotechnology at Unilever.<sup>21</sup>

## From Global to Local

In today's political climate, where the "America First" agenda has emphasized domestic priorities, many people feel disconnected from global issues. As a result, framing sustainability efforts around local communities and their direct benefits will resonate more with an American audience than speaking about a global environmental crisis. Focus on communities and practical wins to personalize the issue and its impact. So, for example, rather than talk about how climate change can impact polar bears and icebergs, dial up the impact on rural or local communities where people may go to hunt, fish, or camp. Audiences will relate more to the local example, making the issue more relevant and personal for them.

### EXAMPLE

Starbucks has committed to building 10,000 [Greener Stores](#) globally by 2025, with a strong focus on the United States.<sup>22</sup> These stores are designed to reduce environmental impact and benefit the local communities where they operate. Starbucks effectively ties sustainability to local economic and social benefits by reducing environmental impact while investing in local communities, job creation, and resource conservation. For example, a Starbucks Greener Store in Southern California features on-site solar panels, low-impact cooling systems, and locally sourced building materials. Employees at this location have spoken about how these stores align with their values and help customers feel good about their purchases. "Sustainability is about more than just reducing our footprint—it's about creating real opportunities for people in the communities we serve. Whether it's through responsibly sourced coffee or Greener Stores, we are committed to making a meaningful local impact," said Michael Kobori, Chief Sustainability Officer at Starbucks.

## Focus on Tangible Results

In today's environment, there is a stronger emphasis on achieving tangible, near-term results rather than long-term. To align with this shift, it is essential to demonstrate progress by clearly communicating key milestones and measurable outcomes. Providing concrete, data-driven results helps build credibility and resonates more effectively with a skeptical public. We also recognize that some plans take time to implement, so it is important to highlight early wins, incremental progress, and foundational steps that signal momentum and commitment toward larger goals.

### EXAMPLE

[Unilever frames their approach to sustainability around "action."](#)<sup>23</sup> They also often use clear, engaging infographics and dashboards to communicate results.

## Frame Using the Positive

There are two ways of framing a position: what we are for and what we are against. Research shows that framing things positively is much more effective. So, for example, saying “we want to move away from fossil fuels” will be perceived much more negatively than “we want to move toward clean energy.” This is because Americans, in general, prefer solutions over a sense of loss or restriction.<sup>2</sup>

### Examples of how to frame clean energy as an opportunity:

- “Diversifying supply of energy sources”
- “Capitalizing on the latest innovation”
- “Getting in on the ground floor of emerging technology”
- “Strengthening community relationships”

## Emphasize Leadership and Competitiveness

When engaging with politically focused audiences, such as members of Congress or the administration, prioritize messaging around national security, economic competition, and leadership. For example, when addressing an American audience, you can emphasize that if the U.S. doesn’t lead in this space, other nations—particularly China—will set the terms of the future economy.

## Focus on Shared Commitment

While the goal is to make climate action less political and more accessible to the public, some audiences may expect you to take a specific stance. In these situations, begin by emphasizing shared goals or commitments rather than differences, which can put people on the defensive. Even if the paths or solutions differ, starting with the end goal and then working backward can make your audience more receptive. For example, if a U.S. automobile manufacturer is speaking to an audience skeptical of electric vehicles (EVs), they might say: “I recognize you may not drive an EV or support policies that promote them, but I do know you care about national security and American competitiveness. If we don’t produce EVs here in the U.S., we risk allowing China to take the global lead.”

## In Summary

A shift in public attitudes and policies does not signal the end of climate action. Instead, it calls for depoliticizing the issue and adapting to audiences who increasingly seek practical, measurable, and actionable solutions to address their specific challenges.

# When to Minimize Pro-Active Communication?

While it may occasionally be appropriate to minimize proactive communications, staying quiet should be the exception, not the rule. Consumers increasingly expect companies to step up. A recent Pew Research survey found that seven in ten Americans believe large businesses are doing too little to reduce the effects of climate change. Silence or vague messaging on these issues risks eroding trust among stakeholders and undermining brand credibility. So it's important to recognize that staying silent to mitigate political or other perceived risk can ultimately do more harm than good.

The strongest approach is to define your own narrative and consistently integrate sustainability efforts into core business operations. Even when the volume of communication is low, the work should remain active, intentional, and aligned with long-term goals.

Using a lower volume doesn't mean avoiding the work. Instead, it means focusing on essential foundational efforts—preparing, strategizing, and ensuring internal alignment—so that when the time is right, you're ready to turn up the volume and communicate effectively. It also includes quietly rolling out changes (e.g., to your website) to ensure consistency in your efforts and brand before taking a more public stance.

It is important to **take control of your own narrative**. If you do not frame your message, whether through a bold public campaign or a more subtle approach, you risk leaving room for others to define it for you.

## RESOURCES

Guidelines on when to minimize proactive communication

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# Develop Core and Tailored Messages

Now that you have considered how to reframe your messaging, it is time to define your key talking points and overall messaging guidelines.

**Collaborate with the appropriate internal stakeholders** (e.g., communications team) to develop these points, as their input is essential to crafting a strong and effective communications strategy.

## 1 Establish messaging guidelines as general principles to follow

For example, based on previous recommendations, one guideline might be to avoid using the term “ESG” because it can be confusing, divisive, and unfamiliar. Instead, consider using broader terms like “responsible business.” The goal is to identify words, phrases, and other ‘rules’ that can steer your communications strategy and keep your audiences engaged.

## 2 Identify three to five core messages

These will serve as the foundation of your communications strategy. These messages should be clear, concise, and consistent across all communication efforts. They should also reflect the moment, take into consideration external factors when shaping your talking points.

### TIP

*Reference your Internal Stakeholder map to determine who to involve in this step.*

Beyond core messages, **develop tailored messages** for specific external audiences. Use audience-specific language, relevant data, compelling stories, and other techniques to ensure resonance. For example, investors and consumers require different messaging. And members of Congress and/or the administration may prefer to hear messaging around national security and American leadership.

Tailored messages can include benefits that go beyond climate impact—for example, improvements in efficiency, lower operating costs, access to new markets, and energy security. The key is to use language, data, and narratives that align with the priorities of each audience.

Document your guidelines, core messaging, and tailored messages in the “Messaging” section of your Communication Plan.

### RESOURCES

[Communication Plan template](#)

# Bringing Your Plan to Life

Once you've identified your target audiences and key messages, the next step is to bring your communication plan to life by putting strategy into action. This includes identifying the right formats and platforms to engage your target audiences and conducting a content audit to ensure alignment with your refined messaging. It also includes outlining roles, key metrics, and tactics for success and organizing your efforts with a content calendar. It is important to note that your communications peers likely lead many of these activities.

**Your goal is not to build a standalone communications strategy, but rather to ensure your work aligns with and complements the organization's broader efforts.**

This level of coordination and planning will enable you to play a more strategic role in shaping your narrative and advancing your goals.



# Prioritize Content Pathing

Once you have identified your target audiences and key messages, determine the most effective content formats for engaging them. For example, do they prefer short videos, infographics, charts, social media, or longer-form text? Also, analyze where your audience engages in both active and passive learning.

**The goal is to meet your audience where they are.**

To streamline content creation and maintain consistency, use the [Spark – Introduce – Inform](#) model.<sup>24</sup> This approach prioritizes quality over quantity, allowing a single content piece to be atomized and used across various media. It also allows you to guide your audience along a learning journey, making it easier for them to engage with you.

**Spark:**  
Short, attention-grabbing content  
*(e.g., a social media post linking to more detailed content).*

**Introduce:**  
Medium-length content that provides deeper insight  
*(e.g., a 30–60 second video explaining the concept further and linking to additional resources).*

**Inform:**  
In-depth content that offers comprehensive analysis and personal impact  
*(e.g., a white paper elaborating on the key points from the initial post and video).*

**TIP**

Review your stakeholder map as you brainstorm content types.

## Examples of Content Types:

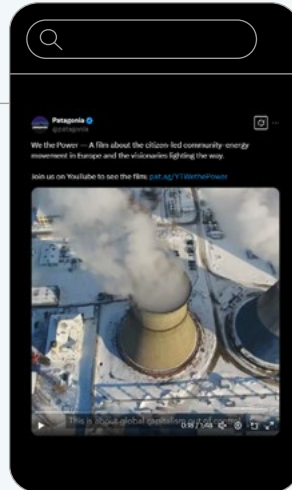
You can use any combination of Spark-Introduce-Inform content to guide your readers along a learning journey.

Spark Content	Introduce Content	Inform Content
Social media post	Blog	1+ minute video
30-second video clip	1-minute video	White paper
Infographic Snapshot	Full infographic	Full report
Report headline	Website or landing page	Website
	Report summary	

## Example: Patagonia's "We the Power" Campaign

### 1 Spark:

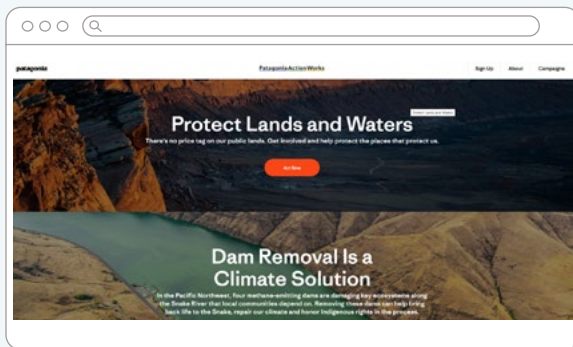
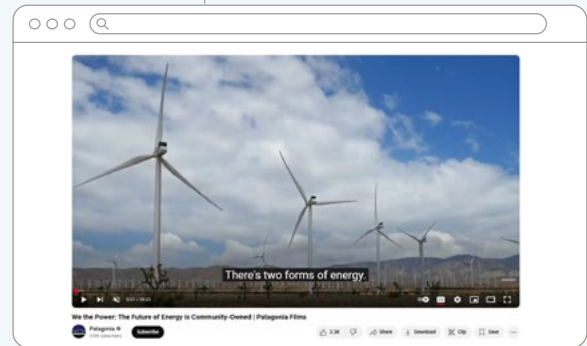
X Post with short video and link to YouTube



### 2 Introduce:

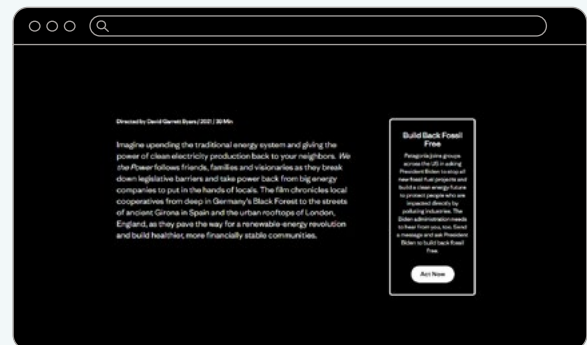
Longer video on YouTube, with link to learn more

Website with link to take action



### 3 Inform:

Action Works landing page



Now that your messaging has been refined, **conduct a content audit** to assess which existing materials can be updated, which should be removed, and what new content needs to be created.

Sort materials into the following categories:

#### Keep:

content is effective and relevant as is

#### Remove:

content is outdated or redundant

#### Update/Repurpose:

content needs improvements and edits

#### New:

identify gaps where new content will be needed

For any new content, be sure to partner with the appropriate internal stakeholders.

## Leveraging Stakeholders to Strengthen Your Message

For communications with long lead times, such as annual sustainability reports, engaging a few trusted partners or coalition members can help ensure your message is understood as intended and carries added credibility. These sounding boards can offer valuable feedback, flag potential concerns, and help you proactively address issues before publication. However, this approach requires existing relationships built on trust; it's not effective to reach out for the first time when you need support. Keep in mind that this type of outreach is best used sparingly, typically only once or twice a year, and is not suitable for time-sensitive situations like incidents or crises. Also, be aware that while feedback from an environmental NGO or other partner can provide important insights, their perspective may reflect a specific constituency—not all stakeholders.

### Choosing the Right Channel for the Message

You will be more successful when your message is matched to the right forum. Public-facing platforms like blogs or social media are best for broad positioning, raising awareness, or showcasing leadership commitments. In contrast, closed-door sessions, such as those at conferences or meetings with policy coalitions, are more appropriate for sensitive insights, early-stage thinking, or candid dialogue with key stakeholders. Consider the audience, the objective, and the level of maturity or risk associated with the message to determine the most effective and appropriate forum for delivery.

## Complete Your Communication Plan

Your communication plan is a culmination of your work throughout this Playbook. Leverage insights gathered in previous sections to finalize your strategy. Collaborate with key internal stakeholders, such as the communications team, to ensure alignment.

This plan will serve as the foundation for your communication strategy, guiding all expected and planned activities. It will also capture **key metrics** to measure success, define **team roles** to clarify responsibilities, and help outline **strategies and tactics** to achieve your communication objectives.

**Complete your communication plan**, and review and update it regularly to reflect internal or external developments.

# Create a Content Calendar

Now that you have your messaging, audience, and plan in place, it is important to organize for action. Start to think about when and where you will execute your tactics.

Every organization has its own unique communication rhythm, but there are key moments when communication is most commonly needed, including:

- issuing annual reports
- releasing key results or studies
- responding to a major external factor  
(e.g., new related policies, a natural disaster, new facility, political elections)
- sharing key updates or changes to your plan

Use your completed stakeholder map and communication plan to develop a communication calendar that helps you plan and anticipate upcoming efforts. Regularly review and update the calendar as needed to stay aligned with evolving priorities. Be sure to share the calendar with relevant internal stakeholders to ensure coordination and alignment.

## NOTE

Your internal communications team likely maintains a master content calendar that tracks activities across the organization, not just those related to sustainability. Your calendar is not intended to replace that master calendar, but rather to serve as a tool to help you better understand and anticipate how your efforts align with the broader communications strategy. For example, releasing an important update or report at the same time as other major organizational announcements could dilute your message. That is why it is critical to share your calendar with relevant internal stakeholders—to ensure alignment and avoid conflicting communications.

## RESOURCES

Content Calendar Template

# Regularly Review and Update Your Plan

As was stated in the [“Setting Expectations”](#) section of the Playbook, you will need to be nimble, responding in the moment and adjusting your strategy as needed.

The process below should be part of the regular review process of your communication plan. By actively monitoring, you stay informed about any expected or unexpected developments that may impact your strategy and messaging.

**1**

## Prepare

Establish a proactive communication strategy and a framework for collaboration with key internal stakeholders.

*\* You are here*

**2**

## Monitor

Stay informed by tracking news, policy updates, and other relevant developments that may impact your strategy and messaging.

**3**

## React

Coordinate internally to determine the most appropriate response.

**4**

## Adjust

Reassess your communication plan to ensure messaging, strategies, and tactics remain aligned with new developments.

**5**

## Align

Ensure all relevant team members are informed of any updates to the plan.



# Scenario Planning

Your communication plan focuses on expected messaging. However, real-world events—missed targets, policy changes, or market shifts—require flexibility and a thoughtful response.

Scenario planning helps you anticipate common challenges, clarify internal roles and approval processes, and outline clear messaging strategies in advance. By working through potential situations and engaging relevant stakeholders early, you can ensure your team is aligned and ready to respond quickly and credibly.





## Handling Unplanned or Unexpected Moments

The purpose of the communication plan is to do just that—plan for your expected messaging efforts. But what happens when external factors arise? How can you prepare for the unexpected? How do those moments impact your overall efforts?

As outlined in the [“Setting Expectations”](#) section of the Playbook, it is important to recognize that no company’s transition or sustainability plan unfolds exactly as intended. At some point, you will need to communicate a missed target or a strategic shift due to factors such as funding constraints, technological advancements, or policy changes. This evolving landscape underscores the need for adaptability in response to shifting circumstances, stakeholder expectations, and market conditions. Organizations must remain agile, responding in real time while adjusting strategies as necessary.

Be careful! Avoid the temptation to selectively omit information if you fall short of a goal. Doing so will erase any credibility gained or trust built over time. Refer to the [“Setting Expectations”](#) section of the Playbook to revisit the importance of building trust and credibility for effective communication.

## Scenario Planning

While it is impossible to predict every scenario, common challenges frequently arise. Use the scenarios in this section to think through how you would approach each situation. Take the time to assess who should be involved internally, determine the best approach for engagement, and understand any approvals or processes required before an urgent situation arises. Being prepared in advance will help ensure a swift, effective, and coordinated response when it matters most.

### For each scenario, answer the following questions:

- How does this change affect your organization's sustainability commitments, operations, and long-term goals?
- Who needs to be involved internally?
- What's the best method and process for engaging these internal stakeholders?
- Are there any internal approvals or requirements to consider?
- What key messages could be used to communicate about this scenario?
- Which communication channels would be most effective for delivering your message?
- What resources are needed to execute the revised strategy effectively?

Once you have completed the scenarios, **discuss them with your internal stakeholders to ensure alignment and incorporate any feedback.** This level of planning will strengthen collaboration and make it easier to respond effectively in the moment.

#### SCENARIO 1

##### **Adapting strategy and/or ambition in response to policy, regulatory, technology, or market shifts**

The landscape of climate sustainability is constantly evolving due to new policies, regulations, technological advancements, and shifts in market dynamics. Organizations must be prepared to reassess and adjust their strategies and ambitions when external changes impact their ability to meet sustainability goals.

#### SCENARIO 2

##### **Adjusting commitment or strategy due to accelerated progress on plan and targets**

In some cases, organizations may exceed their climate and sustainability targets ahead of schedule. While this is a positive outcome, it also presents strategic considerations. Should you set more ambitious goals, expand your focus, or reallocate resources to new priorities? How should internal and external stakeholders be engaged in this evolution?

#### SCENARIO 3

##### **Missing a target or anticipating a shortfall**

Despite careful planning, organizations may fall short of meeting a goal due to unforeseen challenges such as supply chain disruptions, economic downturns, or slower-than-expected technology adoption. Proactively addressing the risk of missing a target and having a plan for response helps maintain credibility, accountability, and momentum.

#### SCENARIO 4

##### **Developing disclosures on plan sub-elements**

Organizations have sub-elements as part of their transition plan disclosure framework. You must determine how to effectively communicate updates on these sub-elements while balancing transparency, credibility, and stakeholder expectations. Some targets may be progressing well, while others face setbacks due to unforeseen circumstances like supply chain disruptions, regulatory shifts, or technological limitations.

# Conclusion

By working through this Playbook, you have taken essential steps to communicate your sustainability strategies effectively.

From identifying key internal stakeholders to enhance planning and collaboration to crafting messages and content that engage external audiences, this process sets the foundation for effective outreach.



The chart below summarizes the steps you covered along the way. Use it as a checklist to ensure you have completed the key actions.

STEP	ACTION	PURPOSE	RELATED SECTION(S)
<b>Step 1</b>	Learn What the Playbook Is and How to Use It	Build awareness of the issue and understand the full process before implementation.	<a href="#">Executive Summary</a> <a href="#">Current State</a> <a href="#">Setting Expectations</a>
<b>Step 2</b>	Understand Your Key Audiences	<b>Internal</b> Align internal teams, reduce confusion, and foster collaboration.  <b>External</b> Identify key stakeholders, tailor messaging, and ensure effective content use.	<a href="#">Stakeholder Mapping</a>
<b>Step 3</b>	Reframe and Tailor Your Messaging	Ensure relevance amid external changes and maintain consistency across communications.  Adjust tone and details to meet the needs of specific stakeholders.	<a href="#">Strategic Messaging</a>
<b>Step 4</b>	Refine Your Content and Choose the Right Formats	Assess existing materials for alignment with updated messaging, and explore effective formats and platforms.	<a href="#">Bringing Your Plan to Life</a>
<b>Step 5</b>	Finalize and Organize Your Communication Plan	Centralize messaging efforts for organization and efficiency.  Capture key planning information, such as strategies, tactics, and a content calendar.	<a href="#">Bringing Your Plan to Life</a>
<b>Step 6</b>	Anticipate Challenges and Map Potential Responses	Prepare for unexpected yet common challenges.	<a href="#">Scenario Planning</a>
<b>Step 7</b>	Regularly Review and Update the Plan	Adapt to evolving circumstances for continued effectiveness.	

# Endnotes

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