



# TELLING YOUR PRO BONO STORY

How to Effectively Communicate Your Pro Bono Initiatives

Developed by

**FOUNDATION**

Contributions from



Morgan Stanley



**“Storytelling is about more than amplifying good work to chosen audiences. The real power in storytelling is its ability to truly *expand the impact of your work* by influencing, empowering, and inspiring all your stakeholders.”**

Alex Heath, Executive Vice President | Group Head | Business + Social Purpose  
Edelman New York

## **For corporate pro bono practitioners, telling stories is critical.**

By communicating the impact of your pro bono programming effectively, you'll promote your company's social good initiatives both internally and externally. Those efforts can help elevate your company's brand and position in the field—that's the power of a good story.

But this guide is about more than just building brand and reputation. It's about leveraging stories as a way to get C-suite buy-in for your initiatives. It's about sharing stories that inspire employees to engage in your programs and become exceptional doers of pro bono. And it's about telling the story of your program's impact on the communities you serve so that you can continue doing work that makes a difference.

We at [Taproot Foundation](#) have picked up tips and tricks for impactful pro bono storytelling over the years. With some help from our friends at Edelman, VMware, and Morgan Stanley, we're sharing insights we've gleaned from our experience with both pro bono programming and strategic communications. Our goal is simple—to equip practitioners with the skills they need to tell powerful stories that move the field forward.

# **THE CHALLENGE WITH PRO BONO STORYTELLING**

Many companies struggle to tell their pro bono stories, and for good reason.

- ▶ **Pro bono is still a relatively young field, with no blueprint yet for storytelling.** While pro bono is one of the fastest-growing types of corporate volunteer programs, many companies are still just starting out. Telling a story of impact can be challenging with little to report back on so far and no widely used framework to guide the process.
- ▶ **Pro bono practitioners may not have access to the communications tools, resources, or support they need.** Corporate Social Responsibility (CSR) and Human Resource (HR) professionals may not have communications staff members on their program teams, or they might not have developed strong relationships with their Marketing and Communications department.
- ▶ **The communications landscape can be tricky to navigate.** There are more channels for information-sharing today than ever before. We're constantly inundated with messages, promotions, news, and more. That influx, along with a general lack of trust in institutions like the media, makes reaching the right audience a unique challenge.

Given all of these barriers, it's no wonder it's so difficult to craft and share compelling stories about pro bono. As the field grows and matures, though, companies are investing more and more in storytelling, and they're beginning to share their lessons learned. In this resource you'll find not only a step-by-step approach on how to develop your own pro bono communications strategy, but also case studies from two companies bringing their stories to life.

# DEVELOPING YOUR STORYTELLING STRATEGY: OUR STEP-BY-STEP APPROACH

To help you become an expert storyteller, we collaborated with Edelman to develop this guide for establishing a communications strategy centered on your pro bono programming.

## 1 PREPARING YOUR KEY STAKEHOLDERS

### **Build a Partnership**

At the end of the day, your stories will be most successful when you tap into the expertise of your Marketing and Communications team. Collaborate with your peers at the outset of your program to make sure your key messages are in line with your company's voice and broader communications strategy. Engage them at other key junctures, too—like when program managers are aligning on strategy or when participants are gathering for the kick-off—so that your communications strategy is in lockstep with your work.

Your communications colleagues are a vital partners in your storytelling efforts and will play a key role in getting your pro bono stories out into the world.

### **Empower Your People**

Your program participants are your best advocates—they represent an authentic voice in sharing your pro bono story. Prepare them to serve as ambassadors by equipping them with tools and knowledge—like key messages—so that they can document their experiences.



# 2

## CRAFTING YOUR STORY

### Know Your Target Audience

What's your end-game for telling your pro bono story? It starts with understanding your audience—whether it's your C-suite or the employees you're trying to recruit. This piece of information can help you shape your narrative, the takeaways you want to highlight, and ultimately your call to action. Here are a few steps to understand your audience.

- ▶ **Gather audience insights.** Uncover the characteristics that define your audience, including what appeals to them and motivates them.
- ▶ **Know how your audience engages.** Learn their preferences, like the social media platforms they frequent, how they like to receive information, or the internal channels they use most, and plan accordingly.
- ▶ **Inspire your audience to act.** A clear call to action is everything. Know what you want your audience to do after reading your story—and express it succinctly.

### Develop Your Narrative

At the heart of every great story is a compelling plot—a conflict, an eventual resolution, and a message for the future. When you're out in the field delivering your programs, be on the lookout for what Edelman calls the "Five Acts of Successful Stories." By keeping an eye out for these elements of quality stories, you can make sure the experiences and messages you're capturing and sharing are the most impactful ones possible.

- ▶ **The Challenge:** What's the big issue facing your protagonist, whether that's the nonprofits you're serving or the employees you're engaging?
- ▶ **The Ideal:** What's the choice people would rather make—their most favorable outcome or solution?
- ▶ **The Unique Approach:** How do you solve this problem like no one else?
- ▶ **Reasons to Believe:** How does your unique approach work? Who are the people behind it, what is the process, and where is the expertise?
- ▶ **Outcomes of Scale:** How does your solution help create a better world?

### Pique Your Audience's Interest

Once you've developed your narrative, pique your audience's interest by infusing it with any of what Edelman calls "The Seven Characteristics of Good Stories." While you shouldn't employ all of these qualities, using a few of them can help brighten your story and win over your audience.

- ▶ **Timeliness:** The story is happening NOW.
- ▶ **Personal Impact:** The story connects to people's lives.
- ▶ **Prominence:** The story features a known figure or issue.
- ▶ **Proximity:** The story takes a local angle; the closer you are to a story, the more you care about it.
- ▶ **Tension:** The story highlights clashes of opinion, opposing viewpoints, or general controversy.
- ▶ **Surprise:** The story puts a spotlight on "strange bedfellows" or another unusual circumstance.
- ▶ **Change:** The story shares a new twist to an old story, telling the next phase or nuance of an ongoing trend.

# 3

## AMPLIFYING YOUR MESSAGE

### Choose Your Storyteller

Who tells your story is just as important as the story itself. To achieve your goal with the intended audience, find a trusted voice that resonates with them.

Those voices could include experts in your field, CEOs, or peers of your audience members. Other potential spokespeople might be the nonprofit organizations you've served, employees who have participated in your pro bono programs, managers of your programs, and even Taproot.

### Disseminate Your Story

It's time to share your pro bono story. First, though, you'll need to choose the method(s) you'll use to get the word out. This is no small feat given the countless platforms, curators, influencers, and publishers out there.

Here again is where the partnership with your Marketing and Communications team will come in handy. Your colleagues in this department have the pulse on the latest content marketing trends. They'll help you prioritize the channels that will reach your intended audience, promote your story on the right platforms, and align your work with the company's broader communications strategy.





**“Storytelling has really been iterative for us. We’ve tested where our stories naturally fit and then collaborated across the entire company to amplify.”**

Jessamine Chin  
Director | VMware Foundation

## IN ACTION:

# VMWARE FOUNDATION

One of VMware Foundation’s recent storytelling efforts grew out of the creation of *Transforming Technology Pro Bono*, a series of guides designed in collaboration with Taproot to move the needle on tech adoption in the social sector. Over the course of the last three years, the Foundation embodied each step of the storytelling approach, highlighting how small but mighty teams can get the work done.

### Step 1: Preparing Key Stakeholders

#### Building partnerships that resonate

One of VMware’s early efforts revolved around cultivating strong relationships across the company, but not just with the obvious players. “We worked very closely with our Global People Development team,” said Jessamine Chin, VMware Foundation’s Director. “This collaboration helped us tie our work to our Leadership Code”—a core part of the company’s culture—“which really resonates with employees.” The alignment was equally critical for connecting to the company’s bottom line. “From a brand perspective, the work we’re doing showcases who we are as a company and how those values translate to our business.”

The team also invested time and energy in partnering with their Global Communications department, keeping them abreast of all of the Foundation’s efforts and engaging them for key initiatives. Many years later, they now have a dedicated communications role supporting the Foundation. “Having [this role] on board has been instrumental in continuing to build our relationship with our Global Communications colleagues,” notes Chin.

### Step 2: Crafting a Story

#### Honing in on audience

*Transforming Technology Pro Bono*—and the stories connected to it—have a wide and varied audience, from the nonprofits and skilled volunteers it was designed for to VMware’s peers in the tech space to the employees who are using the tool in their own pro bono engagements. “We talk a lot as a team about our goals—who is our audience, and what action do we want readers to take?” said Kristin Atkins, Director of Global Impact Communications at VMware. “It’s a tried and true method—adapting your message and your story to your audience is key.”

A prime example is their approach to internal messaging. Chin points out that “as a Foundation, we speak to inspire. We ask ‘how do we get our employees to be active and engaged in their communities?’”

#### Being real through an inspiring narrative

Creating a robust and inspiring narrative around pro bono as a driver in digital transformation laid a solid foundation for the team as they embarked on their



Image courtesy of VMware Foundation

storytelling journey. In their initial phase of communicating *Transforming Technology Pro Bono*, they focused on awareness—sharing the research, their desired outcomes, and “being real about the realities of putting a global pro bono program like this into practice,” said Chin.

### Step 3: Amplifying Message

#### Finding their Chief Storyteller

VMware’s CEO Pat Gelsinger is deeply invested in the company’s philanthropic and global impact efforts, and he is an advocate for telling the Foundation’s story. The result? Gelsinger recently delivered remarks infused with the team’s story of pro bono impact to over 1,000 employees at the company’s recent R&D innovation offsite.

#### Repetition, repetition, repetition

“Even though you feel like you’re repeating yourself ad nauseam, [your story] can still be new for a whole bunch of people,” Atkins points out. VMware’s team engages through multiple touchpoints instead of one big push, which has been a valuable approach to getting their stories out both internally and externally.

The team gets creative with their storytelling as a way to break through the noise internally, from posting digital signage in breakrooms around the globe to features in their company’s bi-weekly video news to inclusion in the company’s new employee onboarding experience. The success of their internal communications has ultimately built a strong employee following for their initiatives.

Externally, the team has maximized their knack for connecting, whether that’s through presenting to their peers at conferences or by leveraging the nonprofit, volunteer, and corporate network of Taproot. And as they’ve found, it always helps if your CEO is active on Twitter.

#### What’s Next?

Much of VMware Foundation’s storytelling efforts so far have focused on the big picture nature of their work. As *Transforming Technology Pro Bono* continues to be embedded in their pro bono programming, the team is shifting their focus to telling the individual stories of impact. “Seeing projects actually come to fruition has been so exciting,” said Chin. “Our communications team is really looking to share these stories to inspire others to take action.”

**“Your partnership with your communications team should be a year-round, day in and day out, relationship. Not the kind of relationship that you only tap into when you’re in a bind.”**

Joan Steinberg  
Global Head of Community  
Affairs | Morgan Stanley

## IN ACTION:

# MORGAN STANLEY

Morgan Stanley strives to be an ambassador for change in the communities where its employees live and work, and giving back to those communities is a core value at the Firm. The communications efforts of the Community Affairs team—where their pro bono programming lives—allow the company to tell this important story of impact. Whether it be the marquee Firmwide pro bono program, Strategy Challenge, which brings together rising talent to help nonprofits solve strategic challenges, or more targeted division led opportunities, the Firm has a range of communications channels to deliver its most impactful message.

## Step 1: Preparing Key Stakeholders

### Deep roots

The success of the team’s pro bono storytelling is deeply rooted in the long-standing relationships they’ve cultivated company wide. They are a partner and a client of the company’s Corporate Communications department, which encompasses internal, digital, and external communications efforts. With both functions rolling up to Corporate Affairs, this integrated partnership is natural. Joan Steinberg, Managing Director and Global Head of Community Affairs at Morgan Stanley, said, “In order to fully tell your pro bono story, your communications partners need to constantly be updated on your efforts. Keeping them in the loop is critical.”

Steinberg also noted the importance of strong support and investment of resources from key leaders in the organization. “When business heads identify telling pro bono stories as a priority, there’s action.”

## Step 2: Crafting a Story

### Knowing your purpose

The Community Affairs team understands how valuable their storytelling efforts are in educating their employees not only about their programs but also the impact those programs have. With giving back as a core value for Morgan Stanley, the team grounds their communications decisions in the question of “how does this relate to who we are as a firm and how we are viewed by our community?”

### Building a narrative from the ground up

“Our communications partners are experts in storytelling,” notes Steinberg. “We rely heavily on them when crafting our stories, as they know what messages resonate here.” The team’s process starts by focusing on the bare bones of a concept, identifying what matters most in just a few words. From there, they tailor the messaging—and fleshed out stories—towards the interests of employees, with the ultimate goal of leading people back to what resonates most with them. Recognizing that they’ll rarely have more than a minute to get their message across, this story has to really hit home.





### **Step 3: Amplifying Message**

#### **Elevating employees' stories**

Morgan Stanley employees like to hear from colleagues and enjoy learning how they're helping communities around them. The Community Affairs team regularly uses employees' first-hand stories as a vehicle for sharing the impact of their work to increase engagement. With a talented and diverse employee base of over 60,000 employees worldwide, programs range from in depth multi-week initiatives to half day intensive sessions with local nonprofits through ScopeAthons, team projects and individual efforts, and everything in between. For programs without a large external platform, Morgan Stanley prioritizes their robust internal social network, allowing employees to lead the storytelling, hopefully in turn motivating additional colleagues to get involved. And what better way to display how their pro bono programming drives key business objectives like employee pride, retention, talent development, and recruitment?

#### **Rising above the noise**

In a busy world, it can be challenging for the team to keep their messages top of mind for employees who often have competing priorities. "Considering how your audience receives their information is essential," says Steinberg, "and your communications partners have this insight. Let the experts guide you." There are a wealth of internal distribution channels at the team's disposal, from leadership communications and the intranet to posters and events.

Externally, they tap into the power of social media and press. They see their greatest success when multiple voices are telling one story of profound impact. For example, when a program has a particularly press-worthy story, they engage their CEO/senior leaders and their nonprofit partners to align on messaging and bring that story to life.

Critical to all of these efforts, though, is tailoring the story and their broader message to the medium. An example here is sharing stories in the form of images and videos on social media as a way to grab and keep attention. "You can't drive deep employee engagement unless you know how to reach employees where they are through effective storytelling," says Steinberg.

#### **What's Next?**

Morgan Stanley's pro bono programming grows by the day, with more and more employees raising their hands to drive meaningful social impact using their skills. The Community Affairs team is using the stories of their participants to build employee awareness of and drive participation in these programs. Their goal? One hundred percent engagement, and they believe expert storytelling will help get them there.

# THE OPPORTUNITY TO TELL YOUR PRO BONO STORY

Stories are a powerful way to inspire action. We tell our pro bono stories to educate others about our work and the impact we can have on the social sector. We tell our pro bono stories so that employees feel empowered to use their skills for good. And we tell our pro bono stories so that more nonprofits get access to the support they need.

But storytelling also has the power to build connection, knit communities together, and foster awareness and empathy across sectors. With a strategic approach to communicating our stories, we as pro bono practitioners can play a significant role in building our movement.

**Ready to get started? Connect with us today!**  
[advisory@taprootfoundation.org](mailto:advisory@taprootfoundation.org)

## FOUNDATION

**Taproot Foundation, a national nonprofit, connects nonprofits and social change organizations with skilled volunteers through pro bono service.** Taproot is creating a world where organizations dedicated to social change have full access to the marketing, strategy, HR, and IT resources they need to be most effective. Since 2001, our Advisory Services practice has partnered with over 85 leading companies across the globe to develop best-in-class, customized, in-house pro bono initiatives.

[www.taprootfoundation.org](http://www.taprootfoundation.org)