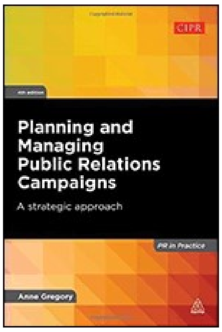

Planning and Managing Public Relations Campaigns: A Strategic Approach, Fourth Edition

by Anne Gregory

Chapter 03: Starting the Planning Process

Responsibilities of Practitioners

Having looked at public relations within the organizational context and recognizing the ways in which public relations can make a contribution to the organization and how it can be structured and conducted, we can now look at planning campaigns in detail.

Public relations practitioners as members of their organizations have two sets of responsibilities. First of all they have organizational responsibilities like anyone else who works in that environment. They are public relations specialists and are responsible for discharging their specialized work to the best of their abilities. In addition to this, if they hold a management or supervisory role they have to handle budgets and people, run an effective department or consultancy, control suppliers, ensure quality standards are met and so on. In fact, all the skills required of any manager are required of public relations professionals.

There are also a number of other pressures. Much of the work is high profile. A mistake made when working with a journalist or influential blogger has very public consequences. In fact, most of the activities of public relations professionals are by definition ‘public’. It's a profession where there are very few ground rules: the practice is not highly prescribed as it is for other professions, such as accountancy and law. The work is often driven by deadlines and demand. When dealing with an issue or crisis it is impossible to predict how large ‘the job’ will be. There are severe qualitative and quantitative pressures on practitioners.

The public relations brief is a large and complex one: to manage the relationship and reputational interface between the organization and all its publics, either as a department or with others.

Hence, a systematic, efficient approach is essential. As far as possible there have to be ways of asserting some control, although total control in the dynamic world of public relations is impossible and not even desirable.

Public Relations Policy

Given that public relations practitioners are not solely responsible for building relationships with stakeholders and publics, the first requirement is for a clear public relations policy to be laid down. This should define the remit of public relations activity and set the ground rules for operation.

The idea of a policy is not to be regulatory and restrictive, but to give the rules of engagement so that everyone knows where responsibility lies, where the lines of demarcation are and, ultimately, who is accountable for what activities. It also gives some security to those non-public relations staff who will be communicating on behalf of the company.

Policy statements need not be long or complicated, but they must be clear.

Figure 3.1 shows an example from a FTSE 100 retailer in the UK. The company has a group (corporate) communication function which deals largely with company-wide matters and which agreed this media policy with senior management.

Media policy

1. As a FTSE 100 retailer we receive a large amount of media attention. The amount of press attention we receive reflects the enormous public interest in our Company.
2. It also represents a tremendous opportunity for us to work with and through the media to communicate with our customers and stakeholders.
3. It is important that we work in a coordinated way, with one voice, to get positive coverage on our stores, products, people, and the contributions we are making in our communities.
4. Handling the media in the right way requires sensitivity and skill. We need to make sure that they receive the correct information at the right time. This is essential if the media is to run balanced stories on our company and is crucial to our success.
5. We have an experienced Corporate Communications team whose responsibility is to manage our relationships with the media, and to provide support in any media dealings. To ensure that we manage our media relationships professionally, to help make the most of these relationships, and to protect you and the Company, we have a comprehensive Media Policy and Guidelines.
6. **Central to these Guidelines is one key principle:** All media calls must be passed onto the relevant media team before making any comment or agreeing to an interview or meeting. More guidance on this is given within this document.

The team

- Corporate Communications comprises of Internal Comms, Public Affairs, Investor Relations and three different press teams. Each of the press teams covers a specific area:

- The Corporate PR Team handles all media enquiries on price sensitive information, and any news or business stories that concern the whole company including the company's brand and our people.
- The Product PR Team handles all queries relating to the products that we sell.

Objectives

- To manage our relationships and dealings with the media in a way that supports our business strategy and plans
- To deliver clear and consistent messages
- To provide the media with the correct facts and agreed Company messages, therefore ensuring that we receive balanced coverage and opinions
- To communicate to the media our news and achievements
- To provide an easy and clear channel of communication for both media and staff by directing all media calls through the relevant media team

Media guidelines

1 Share Price Sensitive Information

As a FTSE 100 company we are listed on the UK Stock Exchange. We are owned by our shareholders who each have a financial investment in the Company.

As such, some of our Company news and information is 'share price sensitive', which means that it can affect the share price and impact on the value of the Company.

The type of news and information which is deemed 'share price sensitive' includes:

- Our company performance – Trading Statements, Interim and Full Year Results – even at a store level
- Strategic announcements
- Future plans for the Business – Including store openings, remodels and closures
- Key Management appointments
- New product and marketing initiatives

As all of these issues can affect the share price, **only** the Corporate PR Team, Company Directors or others specifically authorized should speak to the media on the Company's behalf.

All media calls regarding any of the above should be immediately directed to the Corporate PR Team. Journalists calling to speak to you on any of these issues should be given the direct number of the **Corporate Press Office**: 0XX XXXX XXXX.

A member of the Corporate PR Team is on duty 24 hours a day, 7 days a week to handle such calls. The duty press office can be contacted at anytime, including out-of-office-hours via: 0XX XXXX XXXX.

These rules also apply for any written or emailed communication from the media asking for information.

2 National Media

All other enquiries from national newspapers and magazines, broadcasters (TV or Radio) or online media, should be redirected to the relevant press office:

- ***Specialist Media Calls***

  Specialist or trade magazines that cover areas like IT, e-commerce, Human Resources or Property, may make direct contact with employees requesting quotes or interviews. Please pass any such requests onto the **Corporate Press Office**: 0XX XXXX XXXX

- ***Interview Requests***

Please pass any requests for Interviews onto the Corporate Press Office before committing or agreeing to take part. The team will decide whether it is appropriate to take part and if it is, they will manage the interview to protect you and the business.

They can prepare you in advance, support you, help with any sensitive questions and do any necessary follow-up work after the interview, ie answer any additional questions, communicate the Company's key messages, find out when the article/programme is to run, provide relevant visuals, etc.

- ***Product Calls***

  Media enquiries about products should be put through to the **Product PR team**: on 0XX XXXX XXXX.

3 Regional PR

Due to the volume of calls and emails that Corporate Press team receive from the national press, we have appointed three PR agencies to act as our PR Partners and manage proactive and reactive regional media relations on behalf of our stores.

These specialist agencies work from eight different offices across the UK and Ireland, and are all specialists in working on the ground at a regional level. Their role is to deal with the local press on your behalf.

They are also there to advise on whether activity and stories are appropriate for our Company, so please call them before you begin planning. It is vital that we make sure any messages or stories that go out externally are on brand and consistent.

- **Proactive Regional PR**

  Our PR Partners have been briefed to work closely with our stores to seek out and develop proactive, positive stories for the local press that are appropriate for our Company.

  Please feel free to discuss any opportunity with your local PR partner. Once you've worked with them to select and get involved in an activity, they can then work with you to develop material and messaging that is appropriate to the cause and to our Company.

- **Reactive Regional PR**

  Our PR Partners have also been tasked with responding to all regional media enquiries that come directly into our stores. They are the experts in handling potential media issues – which can be very tricky – and are best placed to develop appropriate company responses.

This could include:

- Temporary store closures due to weather, flooding, fires
- Customer incidents – including theft, accidents and fatalities
- HR-related incidents/issues
- Protests
- Requests for comments on local issues – BIDs, funding, congestion, etc.

Again, this is by no means everything that you may be approached on, so please forward all direct calls from your local or regional newspapers, radio stations or websites to your relevant PR Partner.

The most effective way to do this is to take their contact details and details of their request and to say ‘I'll pass your request on to our Corporate PR Team and ensure that someone gets back to you as soon as possible.’ Do not feel under pressure to give any other response.

And finally…

Given the interest in our Company, it is inevitable that journalists may call you from time to time. If they do please don't panic!

Just remember to:

- Take their name, number, the publication they are writing for or the television/radio programme that they are researching for, the top line details of their request and the deadline to which they are working.

- Pass these details through to the relevant Press Office or PR Partner.

And please don't:

- Ignore a journalist's call, delay passing it on, or bury their request.
- Say ‘no comment’ – this will be printed! Instead, offer to have the appropriate person get back in touch, and pass on the details to the relevant Press Office immediately.
- Be bullied into talking by aggressive or persistent journalists – just pass them on to the relevant Press Office.

The way we manage our media relationships can enhance – or damage – our Company's brand and reputation which makes it essential for all employees to follow the guidelines outlined in this Media Policy.

If you have any queries at all about these guidelines or would like to learn more, please don't hesitate to contact the Corporate Press Team on 0XX XXXX XXXX.

Figure 3.1: FTSE 100 retailer corporate media

Once public relations policy has been confirmed, activities can be planned with a level of confidence that the right people will be handling the right area of work.

Why Planning is Important

It is quite legitimate to ask ‘Why plan?’ There is always so much to do and the world of public relations requires such responsiveness, why not just get on and do it?

Apart from the vital fact of putting some order into working life, as discussed in Chapter 1, there are several other good reasons for planning:

- ***It focuses effort.*** It ensures the unnecessary is excluded. It makes practitioners work on the right things. It helps them to work smart instead of just working hard. It enables them to operate efficiently and effectively because they are concentrating on the things that are important, not just urgent.
- ***It improves effectiveness.*** By working on the right things, agreed objectives will be achieved. Time and money will be saved because effort isn't being diverted into worthy but less important tasks. Importantly it makes saying ‘No’ to unplanned things much easier. Or at least there can be discussion along the lines of, ‘If I take on this task, which of my other prioritized jobs should I drop?’ or, ‘If this task is necesary, we need to employ extra support’. In other words, working to planned campaign objectives gives targets to aim for, a sense of achievement when they are reached, and effective benchmarks for measurement.
- ***It encourages the long-term view.*** By definition, to plan requires looking forward. This forces a longer perspective than the immediate here and now. It requires a look back to evaluate past achievements, a look around at the organization and its priorities and at the broader organizational context, and it helps produce a structured way forward to meet future as well as current needs.
- ***It helps demonstrate value for money.*** If there is a fight for budgets or a need to indicate a return on investment, then demonstrating past achievements and being able to present a powerful, costed, forward-looking and realistic programme gives a point from which to argue a case for money.
- ***It minimizes mishaps.*** Careful planning means that different scenarios will have been considered and the most appropriate selected. It means that there will be meticulous contingency planning and all the angles will have been covered. As far as possible all the potential problems and issues will have been identified and addressed.
- ***It reconciles conflicts.*** When putting together a programme or a campaign there are always conflicts of interests and priorities. Planning helps practitioners confront those difficulties before they arise and to work them through to resolution. Sometimes this can mean difficult discussions with and decisions about other colleagues in different departments, but better to sort that out at the planning stage than in the middle of a complex, time-constrained campaign. Furthermore, if external stakeholders and publics are involved in planning campaigns, their potential issues and conflicts can be addressed at an early stage.

- ***It facilitates proactivity.*** Practitioners setting their own agenda is vitally important. Of course public relations work is about reacting to media demands or responding quickly to a crisis, but it is also about deciding what is important – what actions should be taken, and when. Planning a comprehensive and cohesive campaign helps achieve this.

Planning applies to everything, whether it is to complete campaigns and programmes lasting one or several years or even longer, or to individual activities such as an event or a new publication.

Basic Questions in Planning

The planning process has a number of logical steps that break down into a manageable sequence. It is helpful to ask five basic questions:

What do I want to achieve?	(What are my objectives and desired end-point?)
Who do I want to talk to?	(Who are my stakeholders and publics?)
What do I want to say?	(What is the content I want to get across or the dialogue I want to initiate?)
How shall I say it?	(What mechanisms shall I use to get my content or dialogue across?)
How do I know I've got it right?	(How will I evaluate my work?)

The purpose of campaigns is to influence attitudes, opinions or behaviour in some way. It is also to listen to stakeholders and publics to see whether the organization needs to change in order to maintain support and approval.

To answer the questions posed above there are two major requirements:

- ***Information.*** Finding out everything there is to know about the task in hand – careful research and analysis and turning into useful intelligence.

- ***Strategy.*** Using that intelligence to identify the guiding principles and main thrust of the programme.

From these two requirements comes the tactical programme that can be evaluated for effectiveness.

At this stage it should be noted that the list of questions above includes questions about information-seeking and research (objectives, publics, messages and evaluation), but only one question about the actual doing.

This is about the right proportion of effort that should go into the planning process. Get the research and analysis right, and the programme should then virtually write itself. Please note, it is not being suggested that 80 per cent of the time spent on *implementing* a programme overall should be put into information-seeking. That is plainly wrong as nothing would be achieved on time. However, 80 per cent of the effort put into *devising* an appropriate programme should go into the first stages. Once having put all that work into planning, the implementation has a much greater likelihood of running smoothly and effectively.

All planning models follow a similar pattern, whether they are for the strategic management of an organization or for a public relations campaign. There are four basic steps as shown in Figure 3.2.

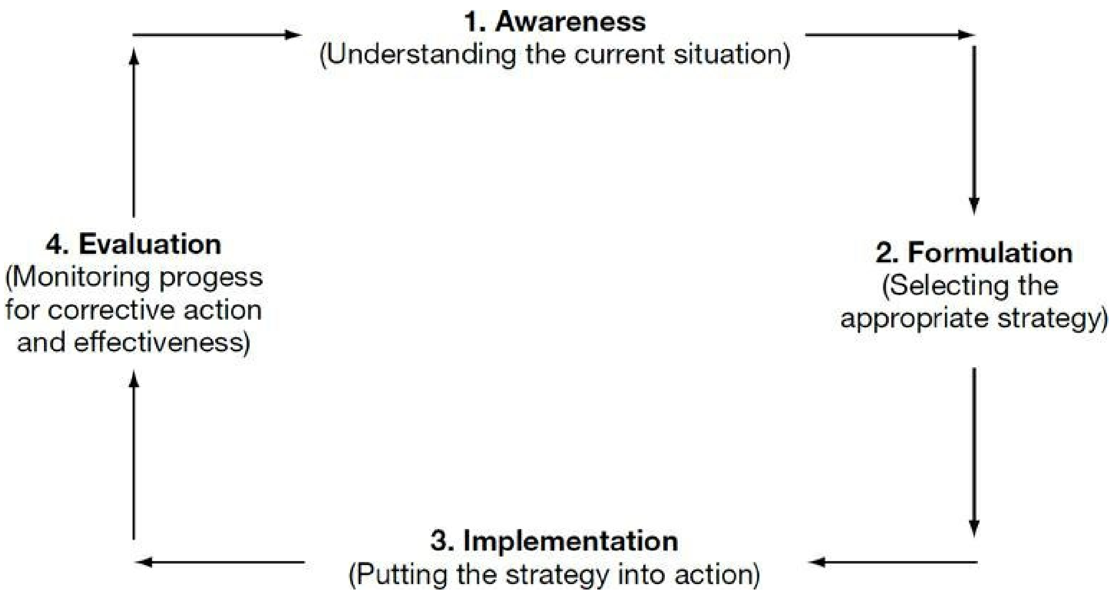

Figure 3.2: The strategic management process

US academics Scott Cutlip, Allen Center and Glen Broom1 visualize the planning and management of public relations programmes as shown in Figure 3.3.

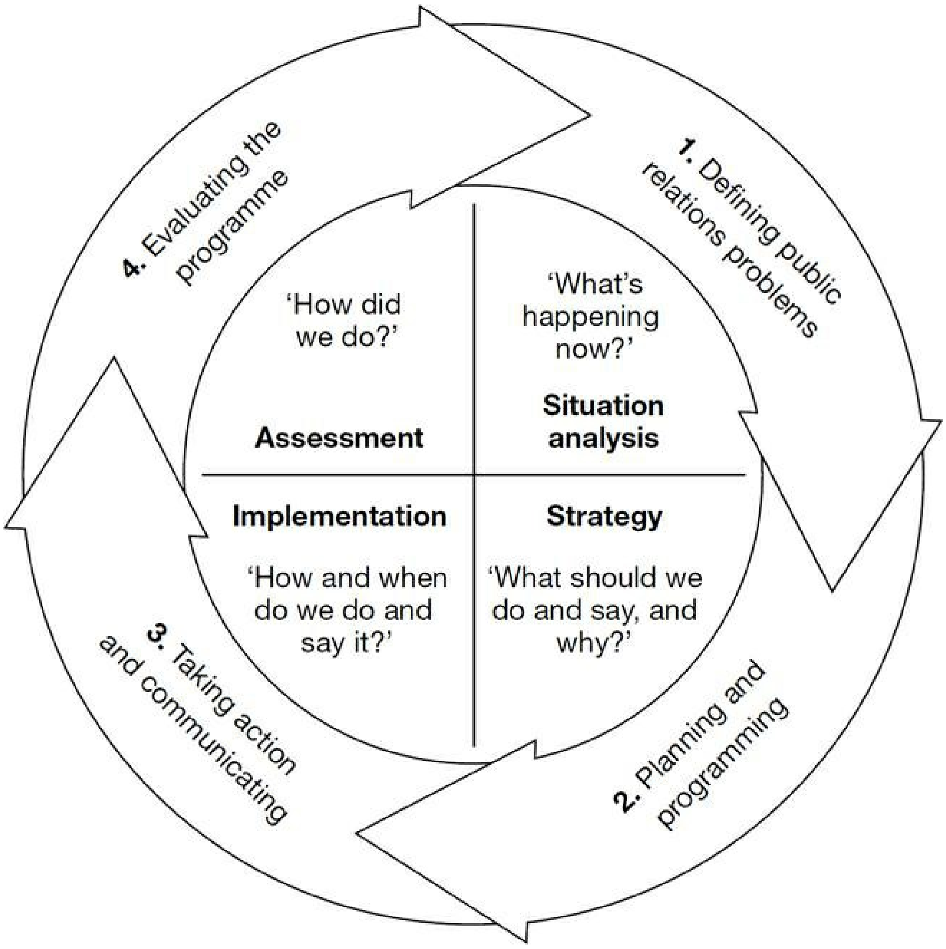

Figure 3.3: Cutlip, Center and Broom's planning and management model

The 12 Stages of Planning

To expand on the above, we can look at a sequence of planning steps that will ensure an effective programme (an ongoing employee relations programme or individual campaign) is put together:

- analysis;
- aims;
- objectives;
- stakeholders and publics;
- content;
- strategy;
- tactics;
- timescales;
- resources;
- monitoring;
- evaluation;

- review.

The UK Government has agreed a planning template that it now uses across all Departments called OASIS[2]. The schematic it uses is given in Figure 3.4.

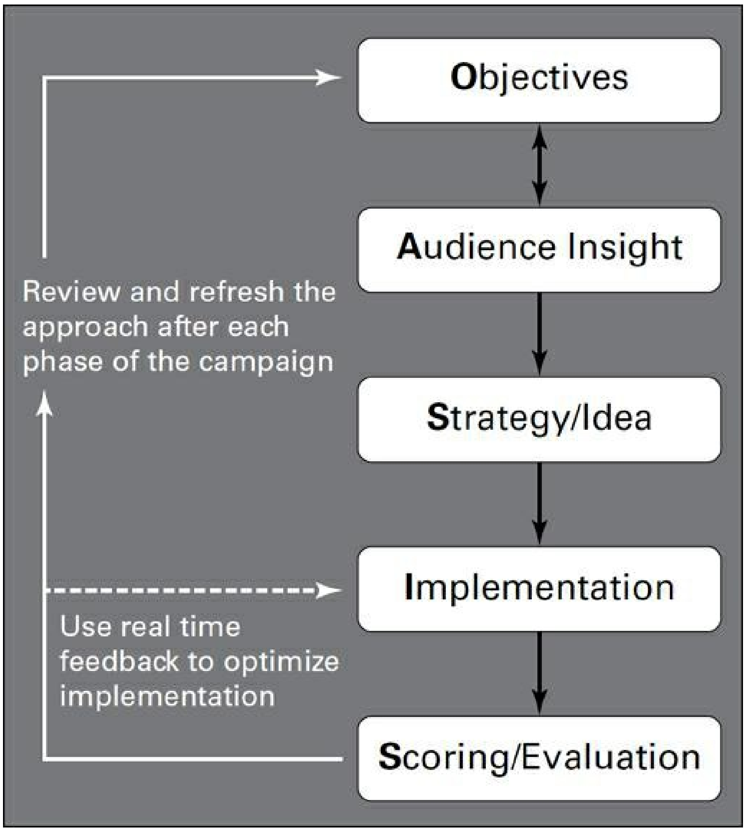

Figure 3.4: The UK Government's communication planning template, OASIS

The planning process is illustrated in Figure 3.5.

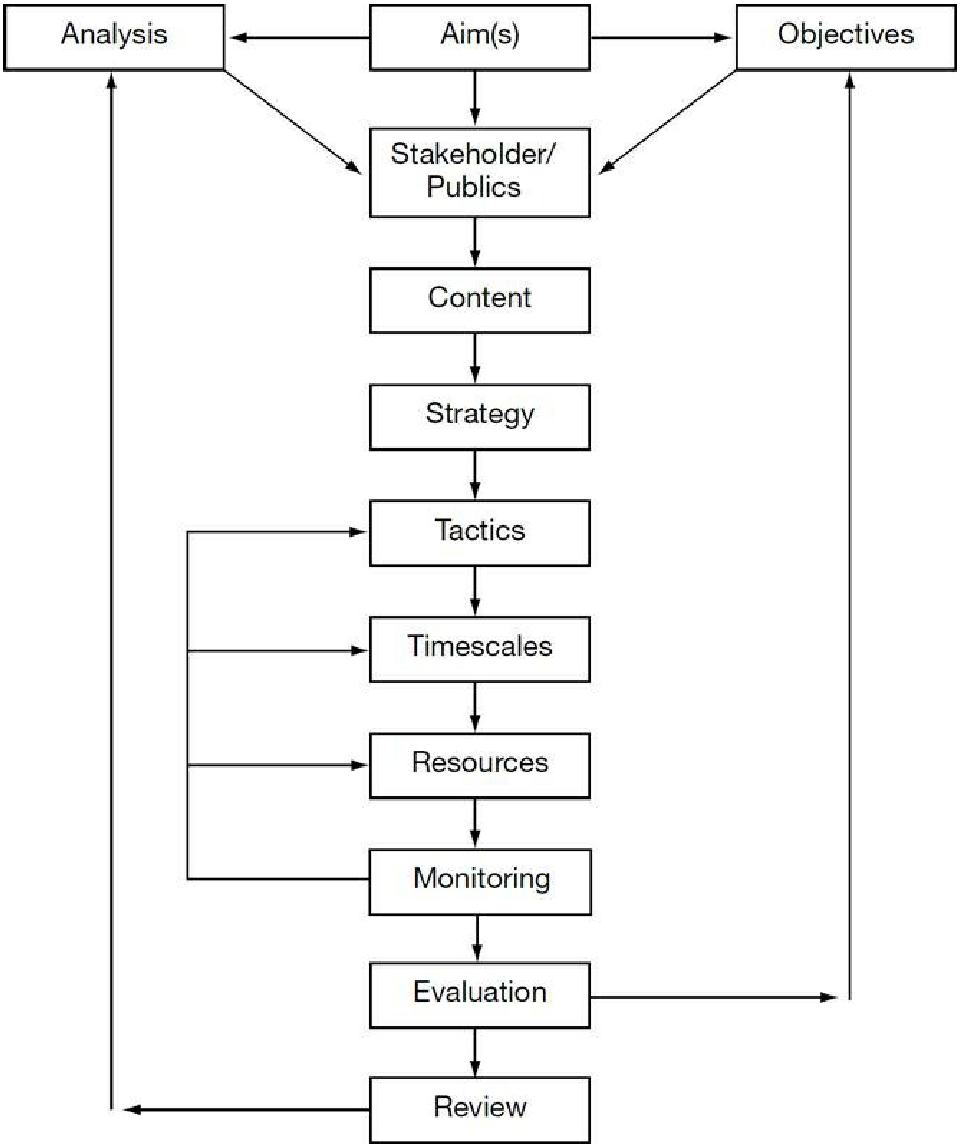

Figure 3.5: The planning process in logical steps

Sometimes the analysis and objectives are in reverse order. An organization might give its public relations department or consultancy a list of objectives it wants them to achieve. However, these objectives must be carefully scrutinized in order to see if they are appropriate and to ensure the objective is a public relations objective or whether it masks a problem that cannot be solved by public relations alone. For example, the organization may say it has a problem recruiting good new staff, in which case the public relations objective would be to help attract new recruits and could commission a communication campaign designed to do just that. However, after careful analysis, the public relations professionals may discover that the real problem is not recruitment, but retention of good staff, thus the objectives of the programme will have to change and an internal rather than external campaign will have to be mounted which addresses employment policies and perhaps cultural issues within the workplace. These problems will require more than communication to solve them.

The planning process looks quite straightforward when laid out as it is in Figure 3.5. However, there are often problems in practice. Sometimes there is a lack of detailed information on which to base the plan. This may be because senior managers are sometimes reluctant to share all the context or details of the situation, or it may be that a client only wants to give a consultancy limited information for reasons of confidentiality. Perhaps the campaign itself is very complex or fast moving, for example a complicated takeover bid. It could be that the plan is being executed under extreme time pressure, in a crisis even. It is often the case that the resources devoted to campaigns are less than ideal and so corners have to be cut or the campaign pruned. There also is the possibility that there are other issues that emerge part-way through the campaign that require energy and resources to be diverted from the original course of action.

However, the scheme outlined gives a solid basis for planning and the template can be followed whatever the scale of the task. If the programme is particularly large it may be necessary to split it down into a series of smaller projects that follow the same steps. Thus there might be a public affairs campaign and a community relations campaign, each with focused objectives and different publics, which feed into an overall programme with wider objectives and broader stakeholders, publics and messages.

This is illustrated in Figure 3.6.

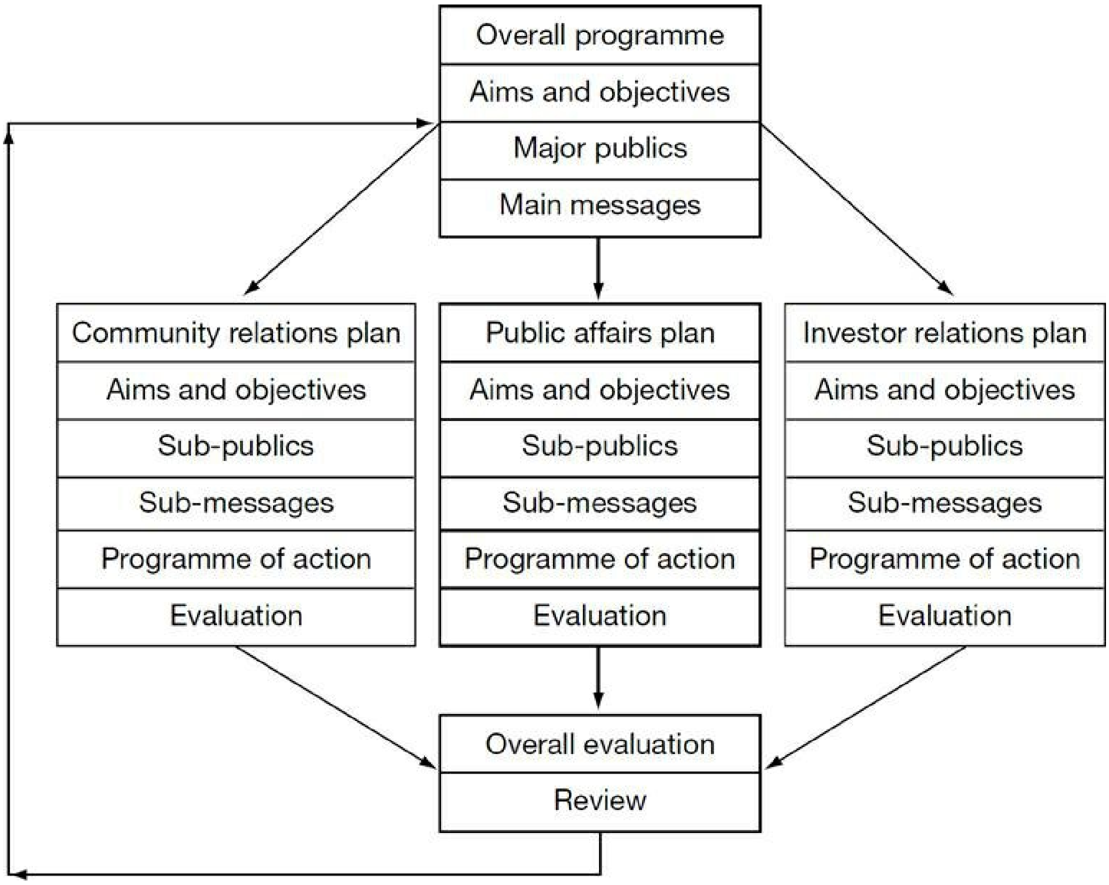

Figure 3.6: Splitting a multi-faceted public relations programme into manageable strands

There are two things that should be noted. First, objectives need to be tied into organizational objectives (see Chapter 5). Second, as described here, the planning process could be perceived to be mechanistic and inflexible. This is not the case. The process described gives a framework for planning. In reality, time and events move on, sometimes very quickly, and public relations practitioners must be prepared to respond to changing circumstances. All the best-laid plans must be capable of being flexed or developed, and indeed scrapped altogether if necessary. Furthermore, it can well be that if an activity has become somewhat routinized, for example an AGM may have a specific format that is adhered to year on year, then the planning template can be used more as a mental checklist to ensure that all the usual areas are covered and to ask sensible questions about whether certain elements have changed or need refreshing.

When working with other colleagues, having a framework that conforms to recognized planning disciplines does provide structure and coherence. The absence of a plan can otherwise indicate the lack of a strategic approach and sometimes a lack of capability. A plan indicates professionalism and accountability. It is an indicator of good management and not only assures the organization that public relations will make a valuable and agreed contribution, but provides boundaries that offer some protection and stability for the practitioner.

It is important to stress that planning is an aid to effective working and not an end in itself. It is not meant to be a straitjacket; neither does it guarantee success. A good plan in and of itself will not make unimaginative or poorly executed programmes work. In addition, as suggested earlier, flexibility and adaptability are essential. In public relations, of all disciplines, there has to be a capability to react and adjust to the dynamic organizational and communication environment. Sometimes objectives and tactics have to change – rapidly. That is a factor of organizational life.

Plans are made to ensure that priorities are focused on and achieved. The planning process holds good, even if programmes themselves have to be adjusted. The steps given in Figure 3.2 can be followed whatever changes are made.

[2]Government Communication Service (2014) *A Guide to Campaign Planning*. Available at https://gen.civilservice.gov.uk/wp-content/uploads/2014/ 05/Guide-to-campaign-planning_May14_v2.pdf

Linking Programme Planning to the Bigger Picture

To illustrate the links between the planning sequence described in this chapter with the wider organizational context discussed in Chapters 1 and 2, Figure 3.7 provides an example.

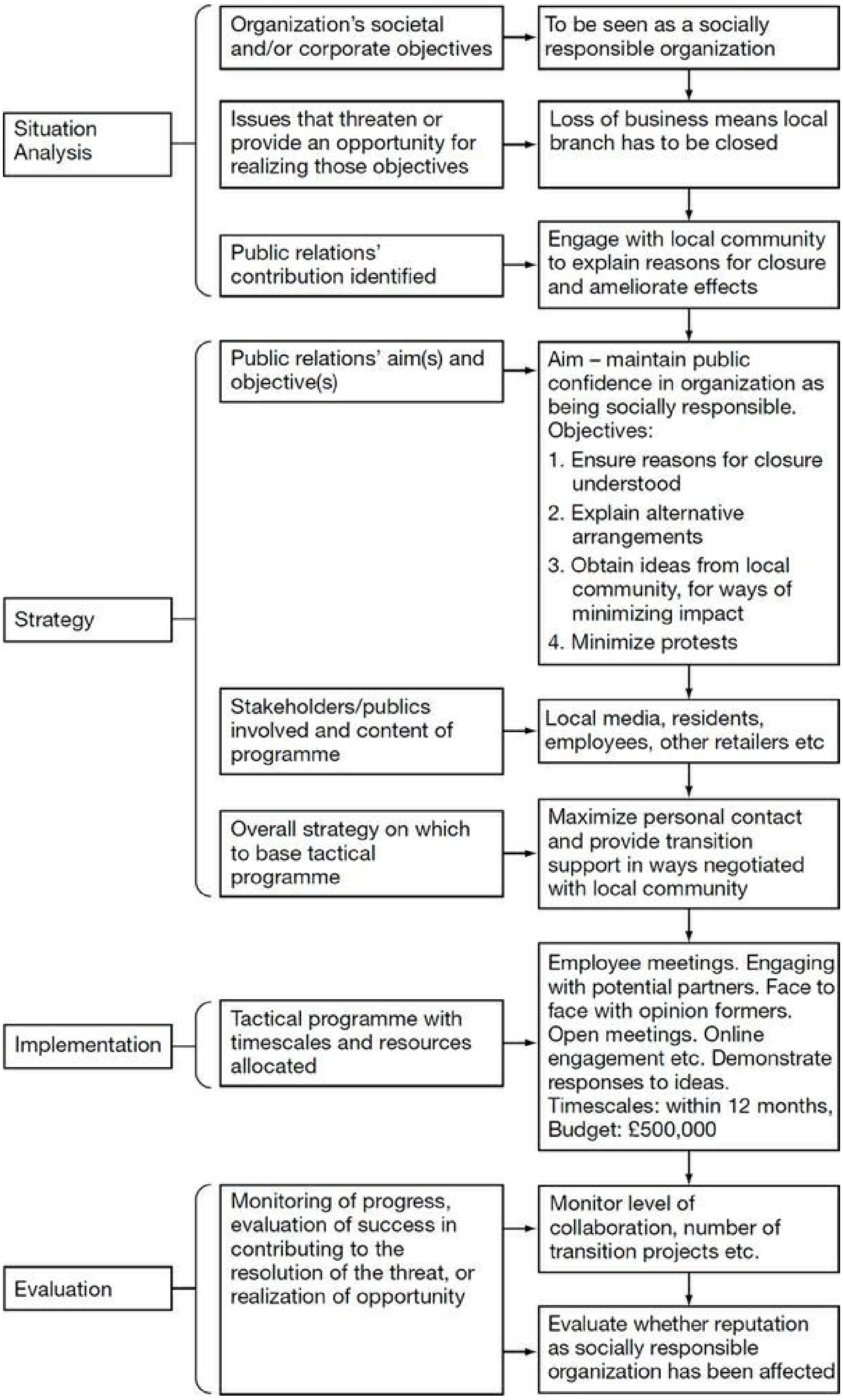

Figure 3.7: A comprehensive planning model

The best campaigns are not planned in isolation. There is a clear golden thread linking the organization in context, organizational imperatives and campaign approach and objectives. Without this link, questions have to be asked about the necessity for the campaign. Campaigns should be impact-oriented and have a defined purpose. Without this they may well be just activity for activity's sake.

Note

1. Cutlip, S M, Center, A H and Broom, G N (2010) *Effective Public Relations*, Prentice-Hall International, Upper Saddle River, NJ, 10th edn

2. Government Communication Service (2014) *A Guide to Campaign Planning*. Available at https://gen.civilservice.gov.uk/wp-content/uploads/2014/ 05/Guide-to-campaign-planning_May14_v2.pdf