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16 Hamrefors, S. (2010). *The Information Officer's Role in Leadership* (see above).

17 See Qian, Y. and Daniels, T.D. (2008). A communication model of employee cynicism toward organisational change, *Corporate Communications: An International Journal*, 13(3), 319–32.

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12 The expert technician

Introduction

Being an accomplished communication technician is an essential part of public relations leadership. The sort of technical skills usually associated with public relations include writing, content development, making a presentation, negotiating with others and carrying out research.¹ These are the practical abilities practitioners display in their key areas of operation such as media relations, crisis management, marketing communication and employee engagement. As with other professions such as accounting and law, demonstrating technical proficiency is necessary if public relations practitioners wish to be considered for executive management positions. Having reached such senior positions in the organisation, public relations leaders continue to display high-level technical skills in tandem with their role as a strategic adviser to the CEO and other executives. This might include high-level media briefings linked to mergers and acquisitions, crisis communication and political lobbying.

Although drawing from a similar knowledge bank, it is important from a personal development perspective to understand how the technical capabilities of a public relations leader differ from those required of a new starter to the profession or a middle manager. This chapter explores this issue. In doing so, it highlights an essential qualitative difference in the technical proficiency required of public relations leaders.

The chapter begins by highlighting three reasons why technical know-how is generally important. The chapter then discusses research that explores the idea of professional expertise and what it entails. This perspective is introduced because it highlights that technical skill is an integrated phenomenon. The most accomplished performers not only understand methods and routines but also have a heightened appreciation of how and when to use them. They exhibit situational sensitivity, flexibility and improvisational skill. The emphasis becomes about contextual intelligence and how individual leaders continually adapt and reconfigure their technical knowledge to cope with an uncertain environment (also see Chapter 6). To illustrate the point the chapter compares the skills required of a novice, intermediate and expert practitioner in a media relations context. This discussion leads to the conclusion that interpersonal

communication skills are pivotal to the maintenance of technical mastery in the field of public relations leadership.

The purpose of the chapter is not to provide a 'how do' guide on key technical aspects of practice. The aim is instead to provoke a reflection on the importance of technical skills in a leadership context and what it is to be a public relations expert. The chapter is therefore divided into the following sections:

- Technician is not a dirty word
- What is an expert?
- From novice to media relations expert
- Making sense of the media environment
- Developing and maintaining expertise

Technician is not a dirty word

There is no shame in a public relations leader continuing to be recognised as a good technician. Being a leader is not all about strategy, vision and directing others. In fact, good technical skills can enhance the public relations practitioner's standing as a leader. Even competence in basic tasks, such as the ability to write a good speech or a compelling article, can enhance a leader's personal credibility within the public relations department as well as across the organisation. Writing in the *Harvard Business Review*, Rob Goffee and Gareth Jones highlight the importance of leaders demonstrating they have specialist skills and a professional hinterland that stretches beyond the realms of leadership and general management.² Periodic demonstrations of technical capability can help to show others in the public relations team that the leader really is 'one of them'. Such actions are a better way of demonstrating empathy and an understanding of their world than platitudes and endless stories of the trials and tribulations the leader has faced during their own career. It also positions the leader as a superior technician the team can learn key skills from.

Outside of the public relations department similar displays of technical proficiency can also help to generate credibility as well as a dialogue with different groups of employees. Goffee and Jones note this is particularly effective when dealing with colleagues who exhibit a strong sense of professional identity. This often manifests itself in a belief within the group that they make a disproportionately large contribution to the success of the organisation. This interpretation of their own worth as experts means they tend to resent the intervention of senior management. Rather than the organisation, such colleagues believe they are ultimately answerable to a higher calling, usually some form of professional association. Examples of such groups include client-facing fee earners in a professional service firm, clinicians in a hospital, research scientists in a pharmaceutical company and academics in a university. Working with such groups requires the public relations leader to demonstrate their own technical mastery. It is about establishing a peer

relationship by showcasing a set of professional skills and knowledge that they do not possess.

The need to understand the nuts and bolts of the job is also driven by the reality of life within many organisations. Danny Moss, Andrew Newman and Barbara DeSanto interviewed practitioners and identified five key characteristics of the public relations managers' role in the UK.³ These were monitor and evaluator, issues management expert, key policy and strategy adviser, trouble shooter/problem solver and, finally, communication technician. Moss and his colleagues suggest that the retention of the technician role may reflect the relatively small size of the communication departments still found in many organisations. The need for public relations leaders to roll up their sleeves is an economic necessity and this is further highlighted when it is considered that the findings of their study were published in 2005. This predates an international economic crisis that has further squeezed the resources available for communication and other strategic management disciplines. Furthermore, the research also highlights that some public relations leaders prefer to retain a close control over certain high risk technical areas such as financial communication and issues management.

A mastery of key technical skills is also important given the strategic model that sits at the heart of this book (see Chapter 5). At the functional level of strategy it is the role of public relations to liaise with the other specialist functional areas in the organisation to determine how the public relations department can contribute its specific communication skills to meet the organisation's mission and objectives. This will include delivering specific programmes and campaigns in support of these aims. At the functional level of public relations strategy, leaders need a clear understanding of the different communication channels at their disposal, as well as the tools and techniques to use them effectively. Public relations leaders not only head up departments that themselves deliver communication products and services, but also support and enable colleagues across the organisation to do the same (see the discussion of the internal educator role in Chapter 13). The ability to execute such a role requires a high level of technical competence and credibility.

What is an expert?

To better understand the technical role of the public relations leader it is helpful to explore in greater detail the nature of professional expertise and operational proficiency. A useful place to start is with an influential study conducted in the 1980s that set out to challenge the thinking behind the development of artificial intelligence in computers. In *Mind Over Machine: The Power of Human Intuition and Expertise in the Era of the Computer*, Hubert and Stuart Dreyfus challenged the assumption that humans can act intelligently only by performing as conscious, analytical problem solvers.⁴ Their work specifically refuted the idea that people generally follow a linear and rational method of reasoning involving sets of formulas, rules, plans and decisions. While such an approach might be

effective in situations involving well-defined tasks and solutions, Dreyfus and Dreyfus argued it is much less useful when confronting problems that are harder to define. This led them to conclude that there are different kinds of intelligent behaviour to analytical reasoning and that these are particularly prevalent amongst highly proficient individuals who are experts in their fields.

To support their case Dreyfus and Dreyfus developed a model of skills acquisition that set out to illustrate how an individual progresses from novice to expert.⁵ These ideas have evolved into a wider theory of expertise and the model is still used to provide a framework for informing managerial development. The key insight to be drawn from the Dreyfus model is that context becomes increasingly important the further someone moves up the different levels of learning. For the Dreyfus brothers context and knowledge are indivisible at the level of the expert practitioner. Rather than being characterised by rules and routine, the upper echelons of the model emphasise heightened situational awareness and decision-making. It is this sensitivity to a given situation, as well as the ability to use and adapt the knowledge we have, which forms the essence of human expertise.

Bent Flyvbjerg encapsulates this thinking with the observation that 'personal experience via trial and error is more important than context-independent, explicit, verbally formulated facts and rules'.⁶ Similarly, knowing when to bend or ignore the rules becomes a key facet of expertise. It is important to note, however, that inherent in this ability to be flexible must also be an appreciation of right and wrong. This, in turn, reinforces the point that ethical decision-making and judgement is bound up not only in expertise but also leadership (see Chapter 8).

This way of looking at expertise is interesting given the challenges faced by public relations leaders at the functional level of strategy. To explore the implications of these insights for practice let us now consider the realm of media relations and what it means to be a novice, intermediate and expert public relations practitioner in this field.

From novice to media relations expert

At the level of a novice the development of media relations skills tends to focus on learning and applying the protocols associated with researching, writing and distributing press releases. This activity requires good written skills, a basic appreciation of news values, knowledge of the techniques required to generate attention-grabbing communication collateral, as well as an understanding of the working habits of journalists and how to reach them. Novices tend to be told which news to promote by their direct line manager or others in the organisation. They therefore operate as the implementer in a process rather than the decision-maker. Given their inexperience novices tend to rigidly apply the rules they are taught regardless of the situation they face. The approval processes and protocols associated with the production of a press release provide a security blanket when responding to the direction of others. This means they tend to exhibit little

discretionary judgement and flexibility. For example, when following up the dispatch of a press release they can be easily fazed by journalists who ask questions they have not anticipated or who maybe views the news that has been presented to them from an entirely different angle. The ability to recognise the questions and issues that may arise in such situations – and the confidence to challenge others about the course of action being recommended – only comes with experience.

The intermediate media relations specialist is more autonomous and flexible in their decision-making. They are still guided consciously by routine and a set of standard procedures (such as those associated with campaign planning and the composition of a press release) as this tends to be their way of coping with a busy and pressurised environment involving a raft of campaign activities, the assimilation of lots of information and the supervision of different people. It also helps them to keep focused on wider objectives and goals. Nevertheless, intermediate practitioners also have the confidence to deviate from established rules and processes. For example, they might be happy to informally pitch ideas to journalists over the telephone rather than go through the process of writing a press release. They are able to do this because of the knowledge they have accumulated from prior experience and their appreciation of how the news they are promoting supports the wider objectives of the organisation. They are also adept at tailoring the same material for different media and spotting emerging opportunities for coverage.

The role of the expert in media relations is qualitatively different from the novice and intermediate practitioner. It is about ensuring the practice of key technical skills – such as writing press releases, working with journalists and planning campaigns – constantly takes into account the situations and issues generated by an unpredictable, diverse and fast moving media environment. This is less to do with having the skills necessary to produce and generate communication collateral and more about the need to interpret how the different parts of the modern media universe impact on one another. This real-time analysis might involve quickly altering the tone and content of a press release in response to new developments; reconsidering the optimum time to release company news; or abandoning a campaign altogether.

To be able to manage in such situations requires a grasp of complex situations that allows the expert to move between intuitive and analytical approaches built on knowledge developed over time. Skill therefore becomes an integrated approach to professional action that incorporates both routines and the decisions linked to how, when and if to use particular approaches and methods.⁷ Improvisation is also an important part of the expert's repertoire. Indeed, it serves to illustrate the very essence of expertise. The process of improvisation involves the flexible and innovative treatment of something that already exists. For example, consider the act of improvisation in jazz. The musicians involved use their technical skills to create something new in real time from an existing piece of music.⁸ Faced with an uncertain and complex situation the public relations expert does the same by drawing upon what they have done in the past to guide their actions in a new and emerging situation.

The following summarises the different skill levels we have just discussed in a media relations context:⁹

Novice:

- Reactive (instructed by others)
- Adheres strictly to rules and guidelines
- Applies these rules regardless of the situation

Intermediate:

- Proactive (can spot an opportunity and respond quickly)
- Still relies on rules and guidelines (but can go off-piste if it is expedient)
- Understands the bigger picture

Expert:

- Interactive (influences the thinking and practices of others)
- No longer relies on rules, guidelines or maxims
- An intuitive grasp of situations based on deep understanding

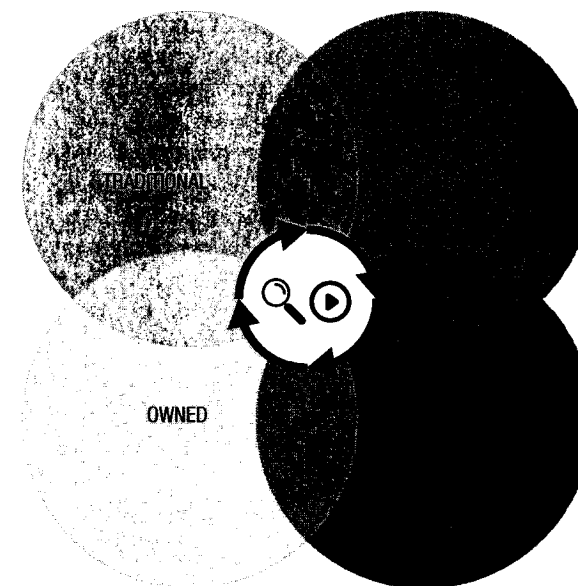
Making sense of the media environment

To further highlight the importance of expertise in the public relations field it is useful to consider Dawn Gilpin and Priscilla Murphy's¹⁰ conceptualisation of the contemporary media landscape as a single complex system. The essential characteristic of a complex system is that it is made up of multiple interacting agents. In the case of the media these different agents are individuals, organisations and media outlets. Each of these agents, in turn, engages in a huge range of digital, non-digital, mass and personal communication. This notion of an integrated system is helpful because it is increasingly difficult to draw neat boundaries between what was once termed traditional and digital media. Even print and broadcast outlets are migrating to a range of digital formats at the same time as maintaining their existing channels. This reinforces Lars Qvortrup's¹¹ observation that digital media integrates all known media into one converged multimedia system with an unlimited system of features.

Edelman, the global public relations consultancy, has tried to make sense of this world for their clients and employees by conceptualising the modern media environment as a cloverleaf consisting of four, overlapping elements (see Figure 12.1). These overlaps further highlight why all media channels are increasingly viewed as one entity rather than as four distinct categories:¹²

- *Traditional media* encompasses radio, TV and print media outlets. This sector includes established media brands such as the BBC, CNN, *Le Figaro* and *El País*.
- *Hybrid media* includes media companies that have emerged in the digital age. These are largely blogs, some of which focus on niche audiences and issues while others have a more mainstream appeal. One of the best-known examples of hybrid media is the *Huffington Post*.

Navigating A New Media Ecosystem



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Figure 12.1 The Edelman media cloverleaf™

Source: Media Cloverleaf

- *Owned media* refers to the media channels that the organisation controls, such as its own website, blogs, podcasts and apps. Companies now have the capacity to cost effectively create content that can be instantaneously communicated to a wide range of external and internal stakeholders.
- *Social media* platforms such as Facebook and Twitter mean that content about a business is not just produced and distributed globally by the company's communication team but also by consumers, employees, partners, suppliers, communities and competitors.

It is the unpredictable nature of the interactions between these different media agents that leads to the creation of a dynamic and unstable system. For example, news of events breaks first increasingly in social media such as Twitter and Facebook. This was the case with the death of Michael Jackson in the United States and the popular uprisings that occurred in the Arab world during the spring of 2011. In such cases the initial absence of credible, independently verified information means that rumour and emotional responses can spread like a forest fire, spilling over into the comment and analysis featured on television, radio and newspapers. The instantaneous communicative capacity and reach of

social media also ensures that this spiral of speculation happens more quickly than ever before.

This complex, overlapping context forces public relations practitioners to sail in uncharted waters. These are areas in which clear rules and guidelines have yet to be devised and established. For example, the Twitter and Facebook platforms that a company creates and controls might also be categorised as owned media rather than social media. As 'owned' media Twitter and Facebook are often used as an important customer-service channel where grievances are aired and disputes resolved. In these online spaces organisations are seen to have a legitimate right to interact with customers that post comments and messages about them. In contrast, social media that is not owned by the company is more problematic. A customer might post unfavourable comments about a company's products on their personal Facebook page. Their friends may join in the chorus of disapproval online. The company may then detect this dissatisfaction as part of its online monitoring activities. However, how will the company be received if it tries to engage with consumers in a place where they usually only interact with friends and family? Is this a legitimate intervention? What if the claims are inaccurate, misleading and damaging to the reputation of the organisation?

Expectations of how organisations should behave in such a media landscape are situational, problematic and fuzzy rather than clear cut. They require judgement to be applied on a case-by-case basis. However, in such a fast-moving environment the time for deliberation and reflection is significantly reduced. The traditional news cycle is dead and public relations leaders are instead faced with 24/7 speculation, comment and analysis. Furthermore, seeking answers in existing methods might be legitimate and useful but does not present practitioners with the whole picture. Too much focus on oven-ready solutions and the sort of traditional management approaches discussed in Chapter 10 can lead to decisional paralysis.¹³ In this climate the essence of expertise is to be a good decision-maker, flexible and emotionally intelligent so he or she can deal with different circumstances.

This is especially important when considering the challenges generated by the different levels of strategy we discuss in Chapter 5. A heightened climate of accountability requires the public relations practitioner to shuttle between these different levels and depending on the type of organisation they work for; this might involve responding to journalist enquiries related to the impact of organisational decision-making on issues linked to the market, taxpayers, customers, overseas workers, the community or the wider public interest.

Developing and maintaining expertise

The challenges we have discussed highlight that a key facet of expertise for the leader is trying to make sense of the world for themselves and others. This sets the frame within which key technical skills are executed. However, it is impossible for one person to fully describe or understand an entity such as a complex adaptive system like the modern media environment. It requires

multiple perspectives, and because the situation may change in unpredictable ways, we need repeated observations and systematic feedback from others. In such an environment interpersonal relationships become the vehicle for wisdom.¹⁴ This highlights the need for public relations leaders to connect within and across the organisation. Developing and maintaining expertise is a social as well as an internal process. It is ongoing and dynamic. Experts develop their thinking through a dialogue with themselves as well as conversations with others. Expert knowledge is not a neat package of finely formed ideas that can be easily communicated from one person to another. Rather, it is the very act of communication that generates knowledge and expertise.¹⁵

These observations serve to highlight the importance of interpersonal communication skills to expertise. Just being well connected is not enough. Experts need to build and maintain relationships that are characterised by trust, reciprocity and cooperation. To build such productive relationships requires a repertoire of interpersonal skills. This involves questioning and listening skills, reflection (see Chapter 11), influencing and persuading, as well as assertiveness.¹⁶ Furthermore, those with a good level of interpersonal skills can also perform as positive communication role models for others in the organisation and are likely to be perceived as good leaders and managers. In addition, the process of interacting with and learning from others hones the proficiency of public relations people in this area, as well as providing further opportunities for them to demonstrate their technical expertise.

Summary

Public relations is a discipline that does not have many rules. It deals in situations, the organisational character and issues such as defining and interpreting values. These are areas of practice where there are few 'rules' and this is one of the reasons why our profession is so difficult to define. Technical proficiency is one of the few ways that public relations practitioners can ground their work which is why good technical skills are so important. However, in their book *The Future of Management*, Gary Hamel and Bill Breen warn against the danger of standards and rules stifling initiative and organisational adaptability.¹⁷ This issue strikes at the heart of why technical expertise is so important for public relations. An expert practitioner needs to continuously reflect on their practice and drive their development through ongoing engagement with others.

This is important because expertise is associated with how individuals interpret and respond to the context they operate in. It is about navigating a way through a situation rather than slavishly applying fixed methods and thinking. Expertise involves knowing when to bend or ignore the rules and how to forge your own path. However, appreciating what rules can be bent is predicated on a foundation of technical excellence. This therefore requires public relations leaders to continue to drive their personal development on technical matters, as well as what might be termed strategic leadership competencies.