

throughout the organisation to take on communication activities on behalf of the organisation. This of course includes those operating at the most senior level of the organisation who look to public relations to coach and mentor them. The key issue here is to build capability and Chapter 13 explores the role of the public relations leader as internal educator.

Part III finishes by focusing on the public relations leader as consultant, whether they work in-house or in a formal consultancy role. If others within the organisation take on public relations responsibility then public relations has to be there to act as a strategic adviser. The objectivity of the consultant is also a crucial skill for the in-house practitioner to acquire. Chapter 14 looks at the consultancy role, draws out the benefits of assuming such a role, but does not underestimate some of the challenges it offers.

10 The planner

Introduction

While this book is about strategic public relations leadership, it is important to cover a number of the major foundation stones of success. Planning is one such foundation stone. Excellence in planning, managing and evaluating public relations is important for two main reasons. First, it demonstrates competence in role. Chapter 12 on the technician role goes into some detail on how demonstrating technical competence provides professionals with the platform from which to take on more strategic roles. Senior managers have confidence in those who show technical proficiency. An accountant who cannot prepare a set of accounts thoroughly and professionally has no credibility. Second, using established business techniques such as recognised planning protocols also positions senior practitioners as mainstream business professionals, familiar with business processes, and a lack of general business knowledge and skills has proved to be a barrier to seniority in organisations for many public relations professionals.

This chapter will not go into the detail of planning public relations and communication campaigns since there are several excellent books on this.¹ What it will cover is:

- The context of planning
- Levels of planning
- Useful planning templates
- Key areas of focus in planning

The purpose of the chapter is to position planning as a strategic lever for the public relations leader. It is not just a process, but a mindset that provides a business stance from which to operate.

The context of planning

The context of planning has to be seen from two perspectives. The macro perspective embraces the 'big-picture' issues that were referred to in Chapter 6

(contextual intelligence). This forms the perpetual but ever-changing backdrop to all organisational activity and is the stuff that frames the interface with stakeholders. It is how the organisation influences, reacts to and deals with these issues and possible futures which determines not only its long-term prospects, but the nature and reputation of the brand in the present. Reactive organisations are always slightly behind the curve, have to respond to the lead of others and have a current reputation that reflects that. Proactive organisations are future-orientated, see opportunities as well as threats in the future and have opportunities to lead, not only because they see possible futures, but because they help to shape them. The systems and processes they put in place to monitor issues and evolving situations is part of their communicative competence, since it is only through this analysis that they can gain intelligence. This will be explored in more detail later in this chapter.

The micro perspective recognises that organisations will manage and undertake their public relations in different ways depending on the specific industry context and the way in which they are structured, operate and interact with their stakeholders. A single issue pressure group or a niche manufacturer will have a focused purpose and its stakeholders can be very specific. A large organisation such as a government department or global company will be multifaceted and have to account to a range of stakeholders who have many and different reasons for engaging with it.

As this book has already shown, understanding and analysing organisational context is critically important since public relations is both buffer and a bridge² to the external world and it is through communication in its broadest interpretation that stakeholders make sense of it.

The contribution of planning at various levels in the organisation

Chapter 5 explained the contribution that strategic public relations can make at the four levels at which it operates. This section will look at these four levels again, this time examining the specific contributions that a planning perspective can make. Keywords in the planning vocabulary are italicised to reinforce the points being made.

Societal level: at this level public relations is focused on identifying the place of the organisation in the world and obtaining and maintaining legitimacy. In the orienter, boundary-spanning³ role the public relations leader employs strategic planning to *monitor* and *analyse* the environment and bring *critical intelligence* to the decision-making processes within the organisation. They also *plan public relations campaigns* which are aimed at building the organisation's positioning, brand and reputation. Thus planning includes information and *intelligence inbound* and *strategic communication outbound*. However planning also has a within-system role. Its job is to constantly *review* the purpose, values and mission of the organisation, to *evaluate* the

organisation's reputational capital with a broad range of stakeholders and to inform the organisation's *strategy development* as it negotiates its contract with society.

Corporate level: at this level public relations focuses on balanced *decision-making* based on the availability of all relevant *data* pertaining to all organisational *resources* and *assets*. This includes reputational and relationship assets and the level of alignment between internal aspirations and the external expectations and experiences of a variety of legitimate stakeholders. This requires *research and analysis*, *insight*, *stakeholder engagement programmes* and constant *monitoring*. The need to *understand* the implications of corporate decisions for stakeholders and *appraise* senior managers of these is also essential at this level. In the navigator role the strategic communication leader is constantly seeking information and intelligence in order to guide the organisation as it seeks to meet its objectives.

Value-chain level: at this level communication focuses on those stakeholders who have immediate and ongoing contact with the organisation. Here, particular expertise in *stakeholder identification*, *segmentation*, *insight*, *engagement* and collaboration is required along with consummate skill in balancing sometimes conflicting stakeholder requirements and expectations. In this catalyst role the planner is the guardian of the value chain, *analysing*, *monitoring* and *evaluating* the quality of the relationships that are being developed and ensuring that the right actions are taken to gain the support of those on whom it depends (bridging). The planner is also sensitive to the fact that they will have to play a defensive role when the organisation is under attack (buffering).

Functional level: at this level the public relations leader liaises with other functional areas (such as marketing, HR and the legal department) in the organisation in order to determine the role of public relations in helping them meet organisational and departmental *objectives*. Public relations programmes will then be professionally *planned and managed* dependent on the requirements of the stakeholder groups involved. Recognised *business planning* templates, processes and systems will be used and built in order to deliver these objectives. Each plan will be different dependent on its purpose, but will be based on *evidence* and *analysis*, an underpinning *strategy*, appropriate *tactics* and will be *monitored* and *evaluated* to assess its level of success. Finally, *planning, implementing and evaluating programmes* that support overall corporate objectives is the functional responsibility of strategic communication leaders.

Having looked at the various levels at which communication has a strategic input, it can be seen that there are parallel processes operating. The first is at the macro level where the senior practitioner needs to be constantly aware of

influences on the organisation which are beyond its control. The second is concerned with the micro or 'task' environment which consists of those factors, organisations, groups and individuals that the organisation interacts with regularly and which can immediately affect its performance. The task environment is normally segmented into groups of influential stakeholders with identifiable characteristics such as suppliers, customers, collaborators, regulators, competitors and activist groups. A useful segmentation of stakeholders is that provided by Bob de Wit and Ron Meyer,⁴ who identify the complex web of those who would need to be taken into account at the corporate, value chain and functional levels (see Figure 10.1).

Upstream vertical (supplier) relations include providers of materials and business services, but also includes labour and information that is outside the organisation and upon which it draws. Downstream vertical (buyer) relations can be clients, customers or intermediaries who buy, sell or promote the products and services of the organisation. Direct horizontal (industry insider) relations involves relationships between the organisations and others in their industry – their peer organisations. Indirect (industry outsider) relations are where an organisation has relationships with those outside its industry, for example those who provide complementary services or products such as a chain of hotels working with a carpet manufacturer. Sociocultural actors are those organisations that have an influence on societal values, beliefs and behaviours such as the media, community groups and non-governmental organisations (NGOs).

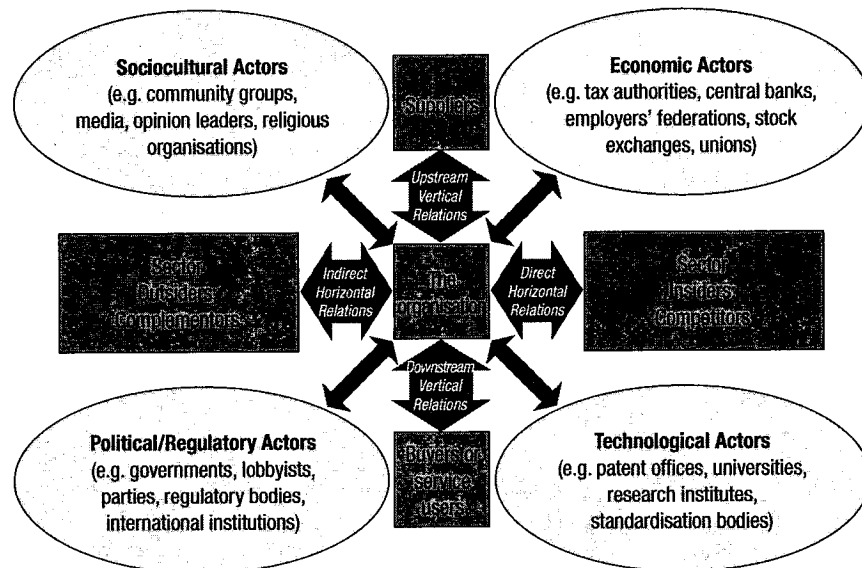


Figure 10.1 De Wit and Meyer's web of relational actors

Source: Adapted from R. de Wit and R. Meyer (2010). *Strategy: Process, Content, Context*. London: Thomson, p. 36.

Economic actors include central banks, stock exchanges, taxation authorities and trade organisations. Political/legal actors include, for example, government, regulatory bodies, international institutions and international NGOs such as the International Court of Human Rights. Technological actors influence the pace and direction of technological developments and create new knowledge, for instance universities, research bodies, government agencies and inventors.

This analysis makes the point that organisations are held in a network of stakeholder relationships who ultimately gave the organisation 'permission' to exist by supporting its 'licence to operate'.

It might be thought that this parallel process of analysing the macro and micro environments is more to do with identifying strategic business issues rather than public relations. This is precisely the point. These issues will force some sort of action from the organisation and action always has public relations dimensions. Indeed, the most impactful strategic public relations programmes address the issues that organisations face.

Strategic planning models and templates

John Thompson and Frank Martin say that strategy is 'the means by which organisations achieve (and seek to achieve) their objectives and purposes'.⁵ Strategic management is the 'process by which an organisation establishes its objectives, formulates actions (strategies) designed to meet these objectives in the desired timescale, implements the actions, and assesses progress and results'. Strategic communication planning models and templates closely align with this process. Research among Europe's public relations community⁶ indicates that 91 per cent of them plan and execute public relations programmes that directly contribute to these goals.

The planning models that are outlined in this chapter are based on what is called the systems view of organisations. We believe the 'open system' is an important concept because it proposes that an organisation is a 'living entity with boundaries, inputs, outputs, "throughputs", and enough feedback from both the internal and external environments so that it can make appropriate adjustments in time to keep on living'.⁷ In other words, open systems are responsive, dynamic organisms which receive, process and initiate information and activity and are in a state of constant flux, set within a context which itself is in flux. That to us reflects organisational life today.

All strategic planning models follow a basic four-step sequence. Step one concerns a thorough understanding of the current situation; step two is about setting aims and choosing the appropriate strategy to achieve those aims; step three involves implementing the strategy; and step four consists of monitoring progress for corrective action or evaluating the final outcomes. It was back in 1979 that John Marston developed the public relations planning acronym RACE (Research, Action, Communication and Evaluation),⁸ with the American academics Scott Cutlip, Alan Center and Glenn Broom developing

what the authors believe to be one of the most helpful public relations models which is provided in Figure 10.2.⁹ The planning model devised by one of us¹⁰ shown in Figure 10.3 captures the essence of the best-known planning approaches¹¹ in an extended sequence of steps.

While it is recognised that most strategic communication leaders will be perfectly familiar with planning models which follow the basic pattern of those shown, it is the experience of the authors that there are some elements of the planning process that are more problematic than others and it is to these areas that this chapter now turns its attention.

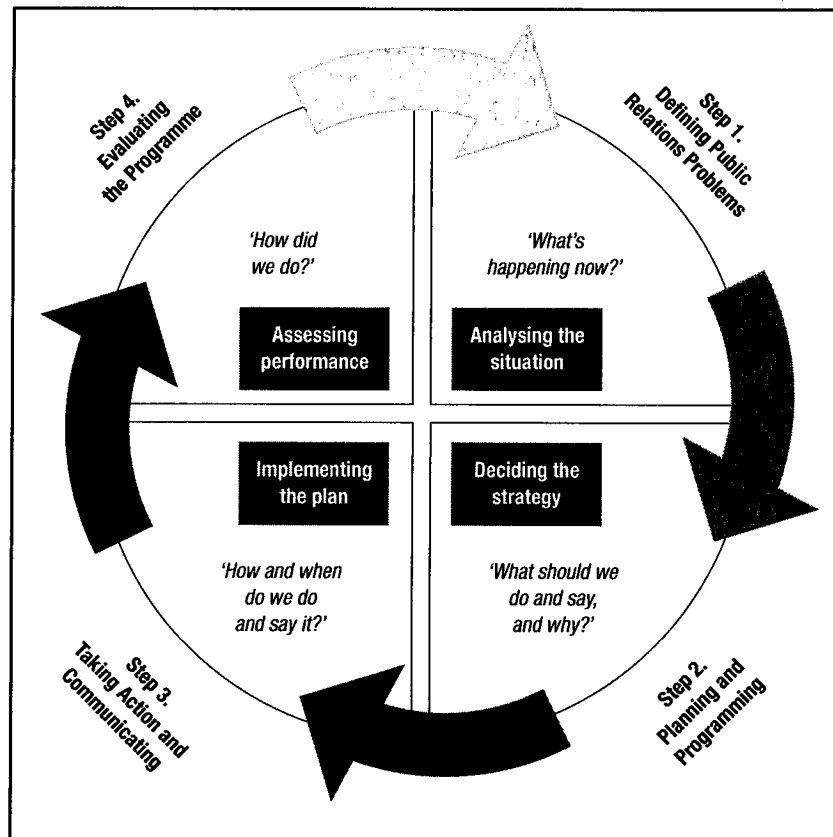


Figure 10.2 Cutlip, Center and Broom's public relations planning model

Source: Adapted from S.M. Cutlip, A.H. Center and G.M. Broom (2010). *Effective Public Relations* (10th edn). Upper Saddle River, NJ: Pearson Prentice Hall, p. 283

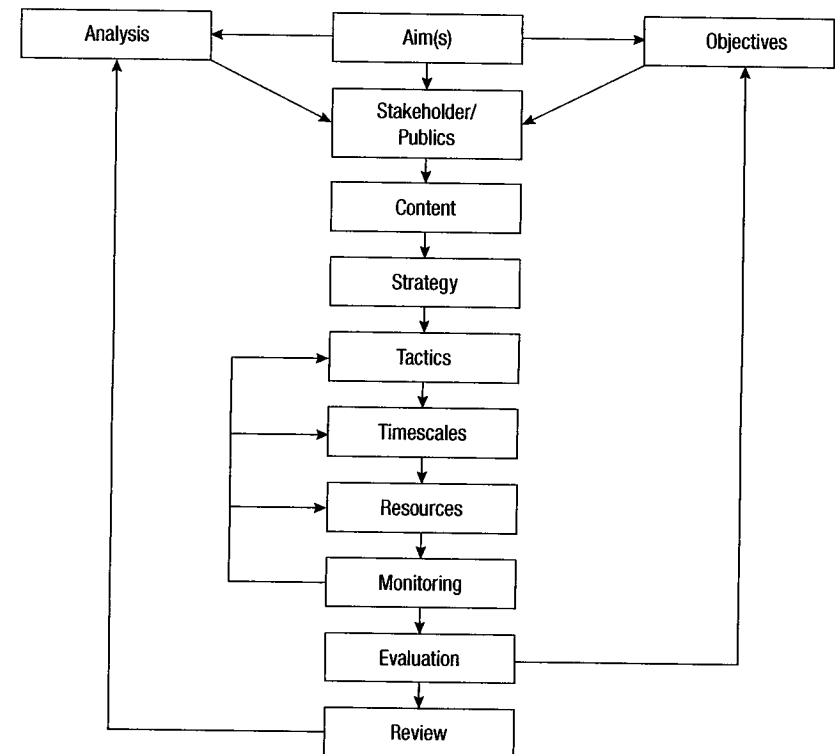


Figure 10.3 Gregory's planning model

Source: A. Gregory (2010). *Planning and Managing Public Relations Campaigns* (3rd edn). London: Kogan Page, p. 42

Problem areas in planning

The strategic planning models above have a logic and flow to them which suggests that each element is linked to and flows from the previous one. However, a general observation is that there are a number of core issues with many plans. In brief these are:

- Plans often appear to be written in siloed sections. Deep and professional analysis does not always appear to be clearly linked to the courses of action that are being recommended and the tactics that are suggested.
- Plans have unrealistic objectives; they over-promise and underestimate the complexity of the task in hand, particularly when this relates to behaviour change.
- Plans regularly lack a strategy: they move from objectives or more often from messages to tactics without a bridging rationale which provides

purpose, coherence and drive to the programme as a whole. As a result, plans contain a smorgasbord of disparate activities which are a credit to creativity, but will not necessarily deliver objectives effectively and efficiently.

- The stated objectives are not clearly linked to evaluation criteria. Too often there are 'proxy' measures or, worse still, measures of activity or outputs which are not related to the impact or outcomes of the plan.

With these general observations in mind, what are the specific areas that deserve more detailed comment?

Analysis. The level of analysis required depends on the scope and complexity of the plan. The most large and complex plans will involve a thorough investigation of both the external and internal environments as has been already indicated. Analytical categorisation techniques such as PEST (Political, Economic, Social and Technological) or the extended EPISTLE (PEST plus Information, Legal, Environmental) will be enlisted to examine the external environment. Techniques such as SWOT (Strengths, Weaknesses, Opportunities and Threats) will be used to explore the internal environment.¹² The challenge appears to be drawing these two sets of analyses together. The key is linkages. Issues in the external environment and particularly with stakeholders are usually linked to problems within the organisation; either people, systems or processes.

Another problem with analysis is the lack of expertise that public relations professionals often have with data-handling. This is unsurprising given the background that many professionals come from. Recognising this deficiency is important and need not be a cause for embarrassment – that is what trained business analysts and consultants are for. Collecting data is one thing, but analysing it and drawing the correct conclusions from it is quite another and it is critically important that the evidence-base on which strategic communication plans are founded is valid and properly interpreted. It is worth considering paying for professional interpretation of the data rather than for its collection if choices have to be made.

Aims and objectives. Agreeing realistic aims and objectives is complicated. Thorough analysis will have revealed the scope, size and nature of the public relations task and therefore the time, resources and expertise required to tackle it. Aims state what the plan seeks to achieve in overall terms, and should be agreed as appropriate with senior managers and linked to organisational aims. A good aim is able to be evaluated at the end of the planning period by being turned into a question. Hence, if the aim is to build relationships with new suppliers in an emerging market then it can be evaluated by asking the question, 'Were relationships built with new suppliers in this market?'

Objectives are the specific and measurable steps that break the aims into what could be regarded as the milestones for the plan. There is a hierarchy of three levels of objectives:¹³

- *Awareness objectives* concern information and knowledge. They focus on providing the *cognitive*, or thinking, element of programme content and on what information stakeholders should know, understand and remember.
- *Acceptance objectives* are concerned with how stakeholders react to information. This is what the *affective*, or emotional, reactions the content is meant to evoke. This relates to interests and attitudes.
- *Action objectives* relate to the hoped for behavioural response. This focuses on the *connotative*, or action, outcomes that are generated when stakeholders are exposed to the content of the programme.

Clearly, it is usually more difficult to achieve behavioural objectives than thinking objectives, the notable exception being hot issues. So, the level of effect (or outcome) anticipated from the objectives set should be chosen with care.

Apart from lack of clarity over the different levels of objectives and the related evaluations, there is often a mixing of *outcome* and *process* aims and objectives. Outcome aims and objectives relate to what the planner wants *stakeholders to do*, the results or impact of the programme. Process aims are framed around what *the planner does* to achieve the aim. Thus, 'maximise the number of employees enrolling in the staff volunteering scheme' is an outcome aim. The aim could have been stated as 'use all available company web-based communication channels to maximise the number of employees enrolling in the staff volunteering scheme'. This includes process as well as an outcome. The authors regularly see objectives such as 'maximise use of social media' or 'deliver a cost-effective programme' without any acknowledgement that these sorts of objectives are very different from outcome objectives, and indeed they are often there to demonstrate activity levels, not value-added.

Stakeholders/publics. Just two comments to make on this topic. First, it is becoming increasingly difficult to identify stakeholders and particularly publics. While De Wit and Meyer's web of relational actors mentioned earlier is useful, it is not exhaustive. As one of the CEO's mentioned to one of us, 'These days I have no idea who will contact me, where they live or anything about them'. Some stakeholders are relatively easy to group and define, for example local politicians, but it is becoming increasingly difficult in a global and interconnected world to identify stakeholders or to categorise them according to the nature of their stake. Indeed, there are some authors¹⁴ who contend that it is becoming impossible to categorise stakeholders in any meaningful way, particularly in the online world, not only because it is difficult to detect the nature of their stake, but because of their fluidity. Stakeholders move in and out of a stakeholding relationship with frequency, for unpredictable lengths of time and for unpredictable reasons.

Second it is helpful to point out the difference between a stakeholder and publics although these words are often used interchangeably. According to public relations academics James Grunig and Fred Repper¹⁵ stakeholders describe categories of people who are affected by the decisions of an organisation or who can themselves affect the organisation; thus, employees and investors are stakeholders. Many stakeholders remain passive, but when

they become aware and active they become 'publics'. Publics form when the behaviour of an organisation causes consequences for them and they organise to do something in response. Hence, publics can cut across stakeholder groupings, for example if an organisation causes local pollution, community groups, local government, government environment agencies as well as employees could become active. The point is that publics collect around issues and whatever descriptor is used, this is a useful way to categorise those groups with whom the organisation interacts. A careful analysis of the *issues* that an organisation may cause or that may impact upon it will reveal those groups who are likely to be active.

Content. Most traditional planning models use the word messages rather than content and it is true to say that message design and distribution to achieve awareness and to persuade has been a feature of public relations practice. Indeed, there are many kinds of campaigns where messages are essential, particularly in public information campaigns. Road safety messages are encapsulated in slogans such as 'tiredness kills'. However, messages are clearly one-way and to evaluate them the originator simply checks to see if they have been received and acted on. Messaging is inappropriate if an organisation genuinely wants to enter a dialogue where the outcome will be mutually determined. Irrespective of the developments in social media and mobile technologies that force organisations into dialogue, collaboration and cooperation are in the long run and with most stakeholders the most effective way to build lasting relationships. Of course Return On Engagement (ROE) is much more complex to measure than receipt of messages and rather more sophisticated evaluation techniques which measure the quality of relationships¹⁶ will be required.

Strategy. Many public relations plans move directly from objectives or content to tactics without having any cohesive and coherent strategy. Strategy is the most difficult part of the planning process and there is remarkable confusion about what it actually is. Strategy forms the backbone of the programme holding all the parts together. The preceding analysis about the context of the programme, issues, objectives, stakeholders and content leads to the point where the platform for tactical activity is determined: it is the fulcrum. Strategy is the rationale that moves the planner from where they are now to where they want to be. It is sometimes called 'the big idea', or an all embracing concept, but it need not be. What is important is that the programme of action has a clear rationale against which tactical ideas can be benchmarked as being acceptable or not. In a nutshell, strategy is *how* the objective will be achieved and tactics are *what* is to be done.

Evaluation. There are numerous books and publications that go into detail on how to evaluate strategic public relations programmes,¹⁷ so this will not be examined in great detail here. However, there are two major problems that persist in evaluation. The first is a search for the 'silver bullet': that single evaluation measure that will demonstrate Return On Investment (ROI). There is no silver bullet and to look for it betrays a lack of appreciation of the complexity of human relationships. What strategic programmes do have is clear, realistic and measurable objectives of the kind indicated above and planners must therefore

demonstrate their performance against them and also be aware of the unintended effects (for good and ill) that some programmes have.

The second issue relates to what is called 'level substitution'. Evaluation normally takes place at five levels: *input*, which is what the planner puts in to their public relations products, for example content and design; *output*, which is how effectively products are distributed and used by target groups, for example how many employees received the e-newsletter; *outtake*, is what the target group extracted from the communication, for example the newsletter content employees remember; *outcome*, which is the impact of the communication, for example how many employees took up the offer of free well-being checks; and *outflow*, which is the long-term reputational impact of the programme. Level substitution involves setting an objective at one level and then measuring it at another, usually lower, level. For example, the objective might be to make a particular stakeholder group aware of impending legislation. The only real way to measure this is to ask them, then their awareness can be properly assessed; this is an outcome measure. However, often evaluations are done at the level of output; for example planners will claim that awareness has been raised because they are able to give statistical evidence of the number of unique visitors to a website providing the information about the legislation. Level substitution continues to be a problem that bedevils the public relations industry, particularly in the area of media measurement where the outputs – clippings or hits are counted – and outcomes are not measured.

Summary

This chapter has stressed the importance of planning as a fundamental building block in public relations leadership. Competence in planning is a key indicator of competence in role. The chapter has stressed the importance of the context in which planning takes place, both in terms of the macro issues and the micro or task issues that dictate what the nature of planned programmes will be. It has also identified that planning has a role to play at all levels in the organisation. The selection of models and templates is typical of those that are widely used, but despite knowledge of these, the issues that have been raised as problem areas are persistent. Mastery of programme planning is a fundamental essential in the kit bag of the strategic public relations leader and a principal lever of credibility.

Notes

- 1 There are a number of books which focus on planning, or which have good sections on planning within them, such as: Broom, G.M. (2009). *Cutlip and Center's Effective Public Relations*, 8th edition. Upper Saddle River, NJ: Prentice Hall; Gregory, A. (2010). *Planning and Managing Public Relations Campaigns*, 3rd edition. London: Kogan Page; Harrison, K. (2011). *Strategic Public Relations: A Practical Guide to Success*. South Yarra: Palgrave Macmillan; Moss, D. and DeSanto, B. (2011). *Public Relations: A Managerial Perspective*. Los Angeles, CA: Sage; Smith, R.D. (2009).