CHAPTER 10

Public relations as planned communication

Learning outcomes

By the end of this chapter you should be able to:

- understand why planning is important for public relations programmes
- identify what research is required to underpin sound programmes
- determine appropriate programme objectives
- select and justify chosen strategy and tactics
- determine required timescales and resources
- evaluate the effectiveness of the campaign and review future direction.

Structure

- Why planning is important
- Systems context of planning
- Approaches to the planning process
- Analysis
- Setting objectives
- Identifying publics
- Messages or content
- Strategy and tactics
- Timescales and resources
- Evaluation and review

Introduction

Successful public relations programmes do not just happen. They are the result of sound research, meticulous planning and careful implementation. This does not rule out the impromptu or the reactive, but these are exceptions.

Recent research among Britain's 'most admired companies' (Gregory and Edwards 2004) shows that up to 70% of their communication activity is pre-planned. The majority of the remaining time is spent making the most of unexpected opportunities and reacting to events such as a major media story, and some time is spent in crisis management. But once these incidents are dealt with, the planned approach is resumed.

Planning will not make a poorly conceived programme successful in achieving its objectives, but planning makes it more likely that a programme will be well conceived in the first place. By ensuring that plans are targeted at the right people, use the right channels of communication and say the appropriate things at the right time, all within agreed timescales and budget, the foundations for success are laid.

Planning public relations programmes should not be difficult but time, effort and knowledge of the planning process is required.

This chapter provides an overview of the planning process. It will introduce each of the stages involved in planning public relations programmes and examine some of the theories that underlie the process. Other chapters will discuss some elements of the planning process in more depth (for example, Chapter 11 on research and evaluation). These chapters and further reading will be highlighted throughout this chapter.

Why planning is important

Within the many definitions of public relations that were discussed in Chapter 1, planned or managed communication is frequently mentioned as a defining characteristic of the discipline. Planning for public relations programmes provides a framework that can stimulate thinking; it acts as a prompt for problem solving and it releases creativity while ensuring it is focused and purposeful.

There are a number of very practical reasons for planning public relations activity:

- Planning focuses effort – by eliminating unnecessary and low-priority work.
- Planning improves effectiveness – by ensuring the planner works to achieve agreed objectives from the outset.
- Planning encourages the long-term view – by requiring the planner to look to the organisation's future needs, preparing it for change and helping it manage future risks.
- Planning assists pro-activity – setting the agenda means planners can be proactive and 'on the front foot'.
- Planning reconciles conflicts – putting together a comprehensive public relations plan means that potential difficulties and conflicts have to be thought through in the planning stage.
- Planning minimises mishaps – thinking through potential scenarios means that most eventualities

PICTURE 10.1 Effective public relations planning might help avert media stories like this where shoppers overwhelmed a newly opened London store. (*Source:* Johny Green/PA/Empics.)

think about 10.1 Planning

Which argument do you find more persuasive: the arguments for planned activity or against? Why? Would these arguments apply to planning a birthday party? Or a study project, such as a dissertation?

can be covered and contingency plans put in place.

- Planning demonstrates value for money – planners can show they have achieved programme objectives within budget and past achievements also help the planner argue for future resourcing.

So why doesn't everyone plan everything? The following suggests why practitioners are sometimes reluctant to plan, despite the arguments outlined above:

- Lack of time – planning is time consuming and ongoing work cannot be suspended while it is done.
- Plans are out of date as soon as they are written – business and particularly communication is conducted in an ever-changing and dynamic environment, so planning has little point.
- Planning raises unrealistic managerial expectations – too many factors that are outside the planner's control to guarantee results.
- Plans are too rigid and stifle the impromptu and opportunistic – flexibility of response is a crucial strength of the communication function.
- Plans are a block to creativity – the approach is formulaic and encourages formulaic activities.
- Plans always reflect the ideal, not the real – it makes it appear that communication work can be tightly controlled and all ambiguities 'planned out'. The reality of doing public relations work, say some practitioners, is not like that.

See Think about 10.1.

Systems context of planning

Public relations planning is located within the positivist framework and maps across very well to the systems view of organisations (see Chapter 8 for more discussion of systems theory). The 'open system' view of an organisation is an important concept for public relations planning, because an open system assumes that the organisation is an organism or 'living entity with boundaries, inputs, outputs, "through-puts", and enough feedback from both the internal and external environments so that it can make appropriate adjustments in time to keep on living' (McElreath 1997).

Cutlip et al. (2000) present an open systems model of public relations that clearly identifies how all these systems characteristics map on to the planning process (see Figure 10.1). So, for example, 'input'

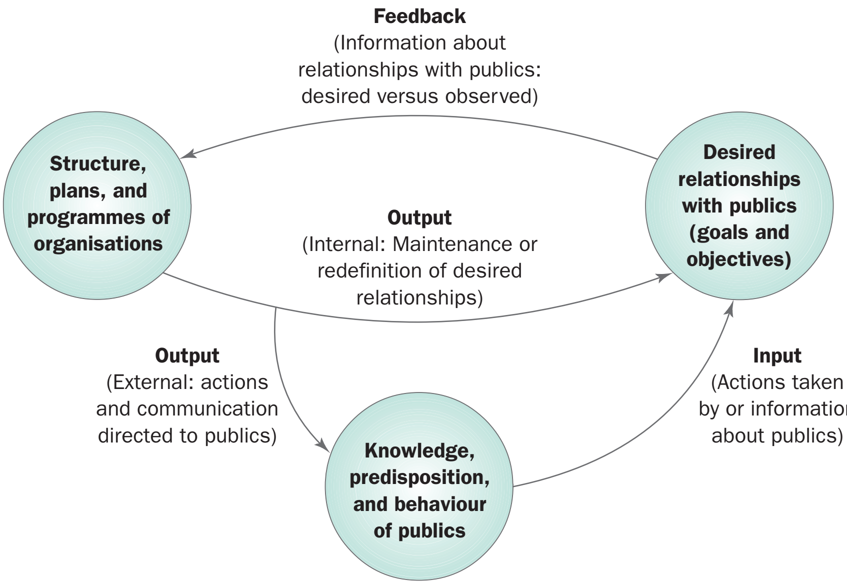


FIGURE 10.1 Open systems model of public relations (*source:* Cutlip, Scott M., Center, Allen H., Broom, Glen M., *Effective Public Relations, 8th Edition*, © 2000, p. 244. Reprinted by permission of Pearson Education, Inc., Upper Saddle River, NJ.)

refers to actions taken by, or information about, publics. These inputs in turn are transformed into goals (aims) and objectives that underpin the desired relationships with publics. By contrast, a 'closed system' approach might neglect to take account of information about publics and thus the planner might formulate aims and objectives in isolation.

Scope of public relations planning

Systematic planning can be applied to public relations activity over a period of several years, such as the Full Stop campaign to prevent child abuse conducted by the UK's National Society for the Prevention of Cruelty to Children, or to short-focused campaigns, such as the launch of a new service, or even to a single activity, such as a press conference.

When discussing the role of the communication planner, Windahl et al. (1992) embrace a wider interpretation of planning programmes or 'campaigns'. Informal communication, which is initiated to begin a dialogue for its own sake, is legitimate and may be 'planned'. It will have a purpose and will involve different publics. For example, key opinion formers may be invited by a university to a hospitality event such as an annual dinner. This occasion may not have a specific planned outcome other than a belief that interpersonal communication is in itself a valuable process which helps people work together in a more cooperative way. This dialogue helps build relationships and a sense of community around the university.

Furthermore, the type of work that planners undertake can be extremely varied. Some planners work for large organisations on large communication projects. For example, government communicators may work on nationwide initiatives such as the one to encourage healthy eating in schools or voting in EU elections, while those working for large corporations may work on global corporate identity initiatives. However, some planners work on quite small projects, for example running an open day for a local charity or volunteering to work with local communities and activists to protest about a local road scheme.

Windahl et al. (1992) also point out that communication initiatives can start at the bottom of an organisation as well as the top. For example, a small department may begin a series of sporting events to build informal communications in the team which eventually widens out into a company-wide and company-supported programme of activities.

This chapter takes the systemic approach to planning, outlined earlier, as its basis. The next step therefore is to examine some of the existing planning approaches.

Approaches to the planning process

The planning process is ordered and enables the public relations planner to structure their approach around certain key aspects (see Figure 10.2). It is helpful to see it as answering six basic questions:

- What is the problem? (Researching the issue.)
- What does the plan seek to achieve? (What are the objectives?)
- Who should be talked to? (With which publics should a relationship be developed?)

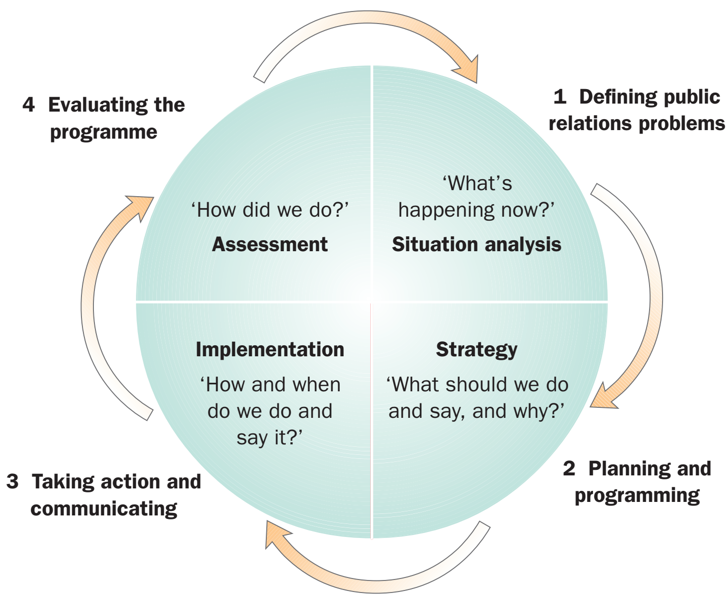


FIGURE 10.2 Cutlip and colleagues' planning model (*source:* Cutlip, Scott M., Center, Allen H., Broom, Glen M., *Effective Public Relations, 8th Edition*, © 2000. Reprinted by permission of Pearson Education, Inc., Upper Saddle River, NJ.)

think about 10.2 Planning processes

Look at the public relations planning processes and models described so far. What are the main similarities between them?

- What should be said? (What is the content or message?)
- How should the message be communicated? (What channels should be used for dissemination?)
- How is success to be judged? (How will the work be evaluated against the objectives?)

Marston (1979) provided one of the best known planning formulae for public relations which is encapsulated in the mnemonic RACE – **R**esearch, **Ac**tion, **C**ommunication and **E**valuation. American academics Cutlip et al. (2000) articulate the public relations planning process as in Figure 10.2.

Gregory (2000) has expanded public relations planning into a sequence of steps that add further detail to the process (see Figure 10.3).

All planning processes follow a basic sequence, whether they are for the strategic management of an organisation or for public relations (see Figure 10.4 and Think about 10.2). The approach advocated here is known as 'management by objectives' (MBO), which means:

- setting objectives and targets
- participation by individual managers in agreeing unit (i.e. department) objectives and criteria of performance

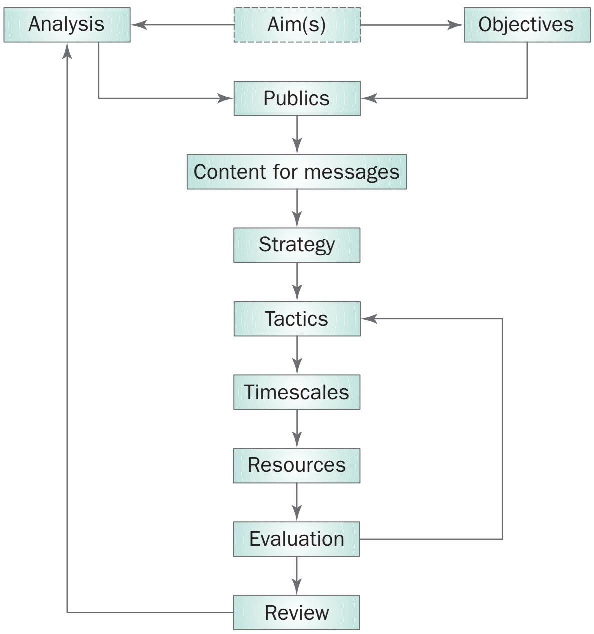


FIGURE 10.3 Gregory's planning model (*source:* Gregory 2000: 44)

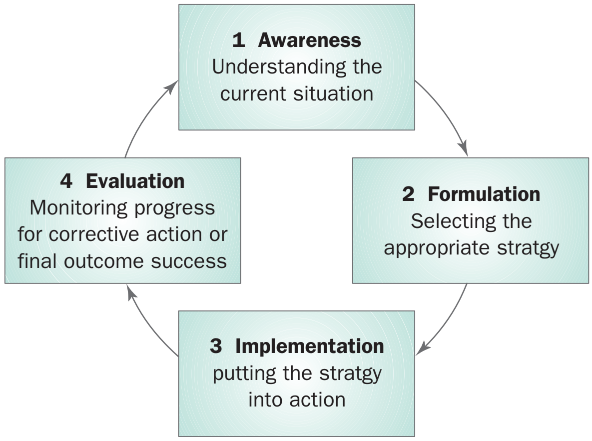


FIGURE 10.4 Basic business planning model

- review and appraisal of results (Mullins 1989: 254).

The MBO system can be integrated into strategic-level corporate planning, at unit level (as in a public relations department) and at the individual level where there is a review of staff performance in a given role (Mullins 1989).

Gregory's planning model in Figure 10.3 provides a sequence of activities and captures the essence of the planning approaches outlined. It will be used to examine the steps of the planning process in detail. However, first it is important to explain the structure of the first part of the diagram.

Although, ideally, the public relations practitioner would undertake analysis of the situation before determining objectives, in practice they are often given objectives by their managers. Such an objective might be to help overturn proposed legislation. In these circumstances it is still vital that the objectives themselves are scrutinised to see if they are appropriate. For example, an organisation may wish to resist the introduction of a stringent piece of environmental legislation because it will be expensive to implement and thereby affect shareholder dividends. However, on investigation, the public relations practitioner may discover that: stakeholders are very much in favour of the legislation; competitor companies will support it; and the company will be out of line if it persists. In this situation the public relations practitioner may recommend that the proposed campaign is abandoned.

The 'aim' element is in a dotted box because sometimes a campaign has a single, simple objective that does not need an overarching aim. If the programme is particularly large, it may be necessary to break down the whole into a series of projects that follow the same basic steps. Each project will have its own specific objectives, publics and content or messages, but this needs to be incorporated into a larger plan which provides a coordinating framework with overall aims, objectives and the message content guidance so that the individual projects do not conflict. (See Figure 10.5.)

Two things need to be borne in mind at this stage. First, the planning template could be seen to encourage a very rigid and undynamic approach. Sometimes practitioners have to move very rapidly in response to unpredictable events. Of course, practitioners must respond to the unplanned. However, even in these circumstances, the template can be used as a checklist to ensure that all the essential elements have been covered. Second, the degree to which any element of the planning process is followed will vary according to the requirements of the task in hand. For example, a full analysis of an organisation's external environment (see also Chapter 2 for an explanation of EPISTLE) will not be required to run an effective open day for families because any key issues will be relatively easy to identify. However, if a major programme is planned, such as the introduction of a new basis for licensing road vehicles, then a full analysis is certainly required, since research about lifestyles, demographics, technological advances and environmental impacts may need to be undertaken to identify and understand the full range of issues which have to be borne in mind by the public relations planner.

The rest of the chapter explores each stage of the planning process in turn.

Analysis

Analysis is the first step of the planning process. The point of analysis, sometimes called 'situation analysis' is to identify the issues or specific problems on which to base the programme. Without identifying the key issues the programme will not have a clear rationale. For example, if the core issue identified for action is that the organisation is seen to be unfriendly towards family carers, there is no point in aiming a recruitment campaign at potential employees such as women without addressing the reasons why the organisation is not an employer of choice for them.

Analysing the environment

This analysis of the external and internal environment is called 'environmental monitoring' by Lerbinger (1972), a phase that is now generally called 'environmental scanning' in the public relations literature (e.g. Grunig et al. 2002).

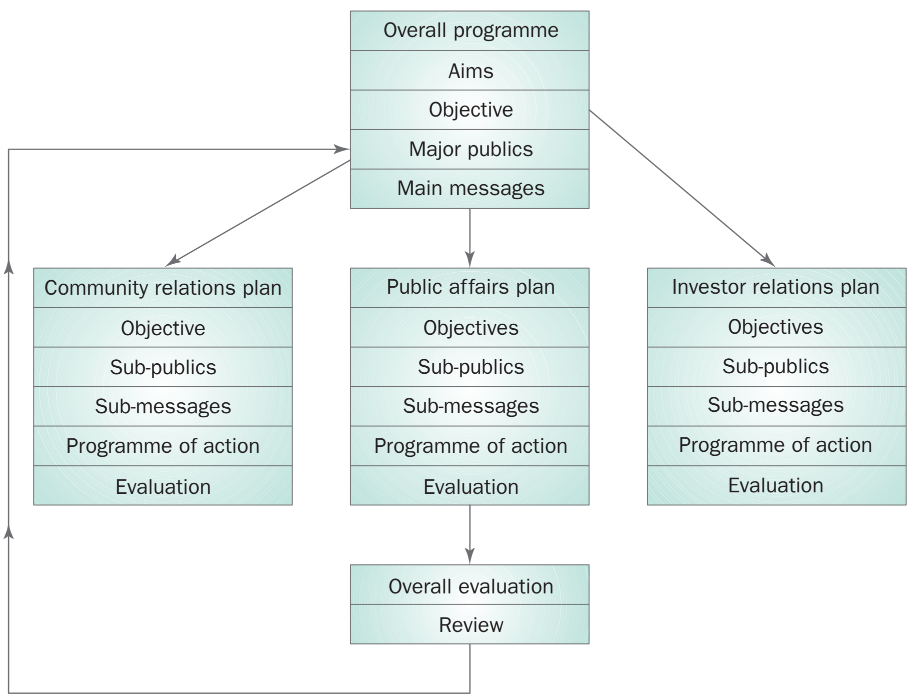


FIGURE 10.5 Framework for multi-project public relations plans (*source:* adapted from Gregory 2000: 46)

Strengths	Weaknesses
Good capital reserves Leading-edge products Loyal customer base Good reputation for service delivery Committed employees	Risk averse in investment Limited product line Ageing customer base Bureaucratic Limited skills base
Opportunities	**Threats**
New market opportunities in Russia Potential to acquire competitors Tax breaks if offices relocated	Potential political instability Danger of being overstretched Loss of loyal employee base

FIGURE 10.6 Example of SWOT analysis

This analysis may seem more appropriate to the identification of strategic business issues than communication issues. However, public relations practitioners need to be alert to the wider environmental issues because it is these that will force some sort of action from the organisation. Action always has communication implications. Indeed, one of the major contributions that public relations can make is to maintain an environmental scanning brief on behalf of their organisation. This 'early warning' of issues allows organisations to manage future risks and is a key strategic input at senior management level. In the light of these emerging issues, organisations can make adjustments to their own strategy and actions to align themselves to new realities. (See also Chapter 19.)

Furthermore, issue spotting helps organisations contribute sensibly to public debate at an early stage and hence influence the outcome. Pressure groups, for example, will spot issues early to influence public debate. In one case, the intervention of environmental and human rights activists at a formative stage in the debate led to the stalling of plans to build dams in disputed areas in India.

The main questions to be asked when undertaking this kind of analysis are:

- What are the environmental factors that affect this organisation (identified from the EPISTLE analysis)?
- Which ones are of most importance now?
- Which will become the most important in the next four years?

From this it will be possible to derive a list of the main issues that will affect the organisation. These will differ depending on the country, the industry sector and the particular circumstances the organisation operates in.

It is important to identify whether some of these issues are linked. For example, social and technological changes are often connected: the lifestyle of many people has been transformed by mobile phone technology. As well as current issues, it is vital to identify the long-term forces for change. For example, concerns about obesity in developed economies will have a profound effect on the drinks, confectionary and fast food industries in the coming decade. Many organisations, from governments to financial and leisure companies, will need to respond to changing demographics that will see the average age of the population rising in many developed countries, with profound effects on the nature of health, welfare and educational provision and on the taxation system that supports them.

Having identified the broader environmental issues that affect the organisation and over which it has little control, it is then necessary to look at the organisation itself and those things over which it has greater control. A classic way to undertake this internal analysis is to use a technique called SWOT. The first two elements, **s**trengths and **w**eaknesses are particular to the organisation and can usually be changed by it, although all organisations are to a certain extent captive to their own history and culture. However, it is in the organisation's power to address its strengths and weaknesses. The third and fourth, **o**pportunities and **t**hreats, are generally external and can be derived from wider environmental analysis (see Chapter 2), but are usually related to those factors that have a direct impact on it. The four elements of SWOT can be seen as mirror segments in a quadrant. An example of a SWOT analysis is given in Figure 10.6.

Analysing publics

Having analysed the environment and the organisation and identified the key issues, it is then essential to look at the organisation's publics and discover what their attitudes are towards the organisation itself, to the wider issues identified by the EPISTLE (see Chapter 2) and SWOT processes or to the particular issue that management have asked the public relations department to address. (See Mini case study 10.1.)

Cutlip et al. (2000) suggest that research can be informal or formal. Informal or exploratory research methods may involve the use of any of the following:

- Personal contacts – these could be at public meetings (e.g. for shareholders or community) or trade shows.
- Key informants – these can be experts, editors, journalists, politicians.

mini case study 10.1

Sea Fish Industry Authority

Identifying stakeholders

Identifying stakeholders is often a complex business. Figure 10.7 is a stakeholder map of the Sea Fish Industry Authority, a trade body based in Scotland.

The inner circle shows the priority stakeholders with the outer rings showing those with progressively less stake in the organisation.

The Sea Fish Industry Authority (Seafish), established in 1981, works across all sectors of the UK seafood industry to promote quality seafood. Its research and projects are aimed at raising standards, improving efficiency and sustainability and ensuring that the entire industry develops in a viable way.

Seafish is the UK's only cross-industry seafood body working with fishermen, processors, wholesalers, seafood farmers, fish friers, caterers, retailers and the import/export trade. It works closely with some 100 trade bodies across the UK. As an executive non-departmental public body (NDPB), sponsored by the four UK government fisheries departments and funded primarily by a levy on seafood landed, farmed or imported, it is accountable to all these stakeholders, as well as those who provide it with grant assistance for individual project work. Seafish must demonstrate to all these groups that its services offer good value for money.

Mission statement

Seafish works with the seafood industry to satisfy consumers, raise standards, improve efficiency and secure a sustainable future.

- Focus groups – for example, informal discussion groups of employees, groups of consumers or a cross-section of the public. Focus groups can be more structured, however, and use an independent moderator to elicit discussion around key themes.
- Advisory committees, panels or boards – many non-profit organisations have these to gauge responses to ideas.
- Ombudsman/woman – this is someone (usually independent) appointed by an organisation to identify and detect problems.
- Call-in telephone lines (e.g. helplines) – these can be set up with varying degrees of success; however, they do signal that the organisation is 'listening'.
- Mail analysis – this involves examining letters to identify comments and criticisms.
- Online sources – monitoring chatrooms and websites for rumours is an increasingly important source of intelligence.
- Field reports – these are people such as the salesforce who can serve as useful early warning for potentially difficult situations.

Chapter 11, on research and evaluation, goes into detail about how to conduct research, including the range of formal social scientific methods that can be employed, but it is important to mention here that the analysis stage of the planning process makes use of all the available information and intelligence on which public relations programmes are based. This preparation work is vitally important in answering the first basic question, 'What is the problem?'

(For an example of a campaign based on solid research, see Case study 10.1 on BT's 'Am I Listening?' campaign at the end of this chapter.)

If the public relations professional discovers that a key public hold a view different from that of the organisation on an issue, then there are two choices. Either the organisation must change to bring itself into line with what the public expects – for example, it may need to change its transport policy so that the local community is no longer disturbed by rogue parking. Or the organisation may wish to persuade its publics to a particular point of view. For example, it may seek to persuade people living around a chemical plant that the fume emissions genuinely are harmless. If key publics are opposed because they simply do not have relevant or accurate information, that can easily be remedied. If the problem is more complex, for example, the fumes are harmless as long as filtered through specially installed chimney baffles, the safety baffles have to be in place before communication can do its job.

As this last example indicates, sometimes public relations practitioners are asked to solve problems that are not just communication problems. So the planner must analyse the situation to see if they are amenable to communication solutions. Windahl et al. (1992) say that a communication problem can be defined in one of two ways: first, the problem arises from the *lack of* or the *wrong sort of communication*. For example, it may be that a child vaccination is not being taken up because it has been publicised only to doctors, not to parents, and because it has been described by its technical name, not its popular name. Second, the problem is a communication problem if it can be solved by *communication alone*. In this example, if parents are given the required information (*lack of* communication problem solved) and the popular name is used (*wrong sort* of communication

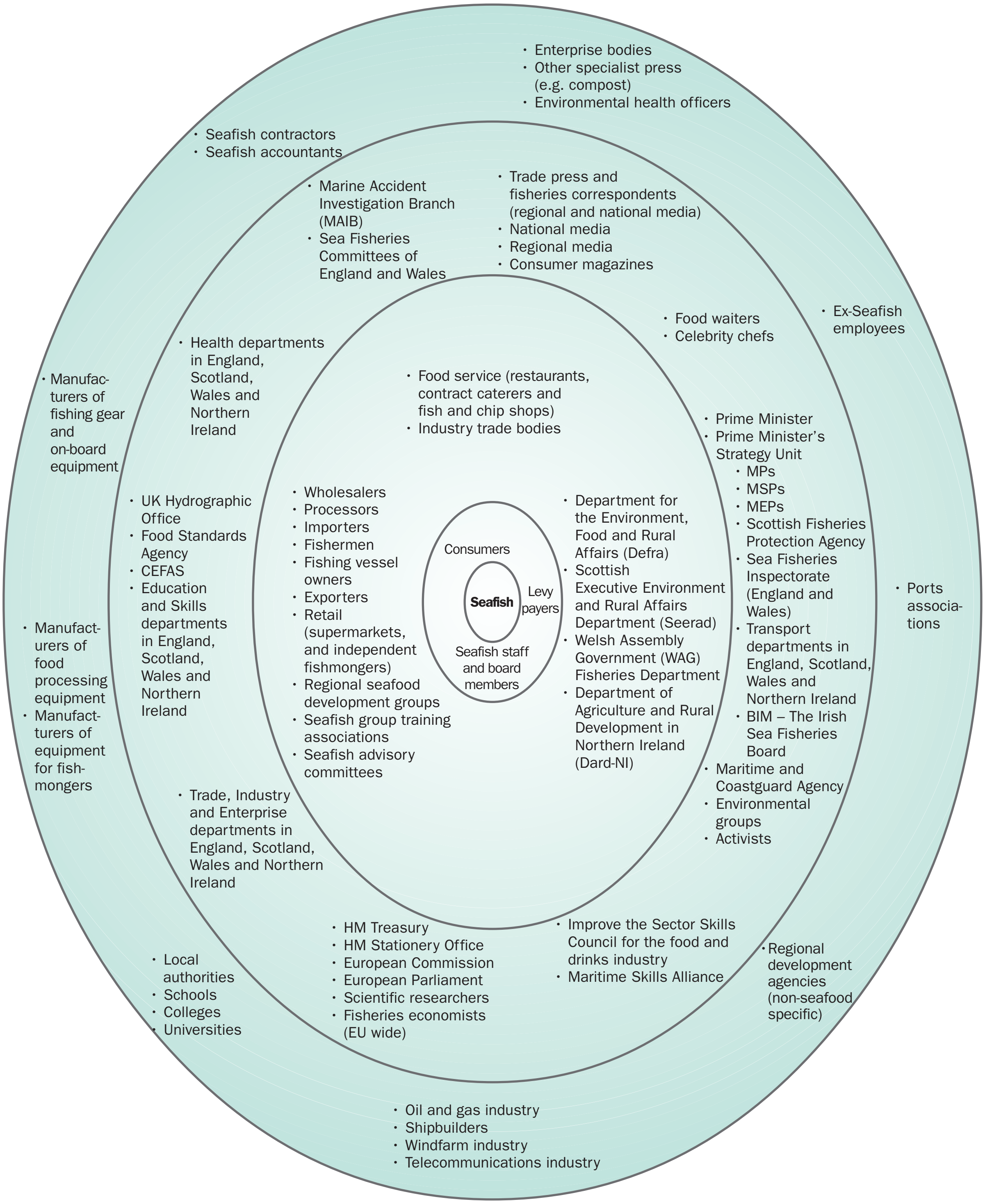


FIGURE 10.7 Stakeholder map of the Sea Fish Industry Authority (Produced by Kirsty Innes MCIPR on behalf of the Sea Fish Industry Authority (Seafish))

problem solved), it is likely that vaccination uptake will increase.

Often what are regarded as 'communication problems' are a mixture of communication and other issues and the public relations practitioner must be able to separate them. For example, if the uptake of child vaccinations were also being affected by suspicion about side-effects, or if they were only available at certain clinics, then there is more than a communication problem. Some other measures such as independent clinical opinion or wider distribution of the vaccine may be needed to stimulate use.

There are occasions when no amount of communication will assist in solving a problem. For example, no amount of excellent communication will make citizens happy to have a rubbish dump sited next to them. The best that can be hoped for is limited protest.

Thus it can be seen that analysis not only identifies the issue, but also points to the precise contribution that public relations can make to its resolution.

Setting objectives

To set realistic objectives it is necessary to know the size and nature of the communication task. Research among publics will have uncovered their knowledge, attitudes and behaviour on any particular topic, which will provide the starting point. The planner then needs to decide what movement is required, if any: a legitimate objective may be to confirm existing attitudes or actions. Objectives are usually set at one of three levels (Grunig and Hunt 1984; Cutlip et al. 2000), as shown in Table 10.1.

According to Grunig and Hunt (1984), three things should be borne in mind that will make the achievement of objectives easier:

1. The level of effect or outcome should be chosen with care. If the communication planner wants to introduce a new or complex idea, it would be sensible to set cognitive objectives first, rather than hoping for conative effects from the start.
2. Choose target publics with advocacy in mind. Research should have identified those who already support the organisational policies or who could be easily enlisted (more on this in Chapter 11). They can then act as advocates on behalf of the organisation.
3. Organisations can change too. Sometimes minor adjustments in the organisation's stance can elicit a major, positive response from publics.

Generally speaking it is much more difficult to get someone to *behave* in a certain way than it is to prompt them to *think* about something, the notable exception being over hot issues (see Chapter 14).

Cutlip et al. (2000) warn that public relations programme objectives all too often describe the tactic instead of the desired outcome for a particular public. In the 'employee' public example below, a tactical objective would be to issue the corporate plan. However, the objective that focuses on the desired outcome for employees is 'to ensure awareness of the new corporate plan'. This is the public relations objective where the effort is focused on confirmation or change in knowledge, attitude or behaviour among those publics communicated with.

All objectives should be SMART: **s**pecific, **m**easurable, **a**chievable (within the planner's ability to deliver) **r**esourced and **t**ime bound. Examples of SMART objectives follow. Note that the desired outcome for each public is highlighted in bold.

Employees: **Ensure every employee is aware** of new corporate plan by 10 November and, three weeks later, can list three priorities for next year.

Community: Use sponsorship of 20 local junior football teams to **promote more positive opinion about company among parents**.

Corporate: Change legislation on taxation of charity giving within two years **through influencing attitudes of government officials and ministers**.

Trade: Double amount of coverage in trade media in one year **to overcome lack of awareness among key suppliers**.

TABLE 10.1 Objectives set at one of three levels

Cognitive (means related to thoughts, reflection, awareness)	Encouraging the target public to *think* about something or to create awareness. For example, local government might want the local community to be aware that it is holding a housing information day. The whole community will not need the service, but part of local government's reason for making them aware is so that they know what a proactive and interested local council they have
Affective (means related to feelings, emotional reaction)	Encouraging the target public to form a particular attitude, opinion or feeling about a subject. For example, a pressure group may want moral support for or against gun ownership
Conative (means related to behaviour, actions or change)	Encouraging the target public to *behave* in a certain way. For example, the local hospital may use television to ask for emergency blood donors following a major incident

Consumer: Increase face-to-face contact with consumers by 20% in 18 months to **counter perception of company being remote**.

Apart from setting SMART objectives, there are four prerequisites for objective setting that will ensure that they are organisationally relevant and deliverable (Gregory 2000):

- Ally the public relations objectives to *organisational objectives*. If the corporate objective is to grow the company by acquiring other companies, then public relations activity must be focused on that.
- Ensure the objectives are *public relations* objectives. Employee satisfaction cannot be achieved through communication if the main problem is poor working conditions. The source of the problem must be removed first and this is a management issue.
- Promise what is *achievable*. It is better to set modest objectives (e.g. cognitive objective) and meet them than to over-promise (e.g. set behavioural objectives) and fail.
- Work to *priorities*. This way the more important areas of the plan will be achieved. If the planner is then required to work on other things, the least important things can be removed from the plan. Likewise, if there are budget cuts, again the least important activities can be forgone.

As stated earlier, programmes and campaigns can be large or small. Similarly, objectives apply to both large and small programmes and campaigns. They can also be applied in strategic or tactical programmes or campaigns. The examples in Table 10.2 show how. Note how the tactical objectives do not go into detail of the specifics of the tactical approach.

Setting sound objectives is fundamental to public relations planning. They define what the outcomes of the programme should be, they support the strategy, set the agenda for action and are the benchmark against which the programme will be evaluated. Their importance cannot be overstated. (See Activity 10.1.)

activity 10.1

Evaluating objectives

Go to the Chartered Institute of Public Relations website (www.cipr.co.uk/prideaward/winners). Look at some of the award-winning entries and analyse the objectives. Are they genuine objectives? Are they SMART?

Identifying publics

The section on objectives answered the second basic question in planning programmes, 'What does the plan seek to achieve?' This next section answers the third, 'Who should we talk to?' Chapter 12 is devoted to audiences, publics and stakeholders so this section will be relatively brief.

Research for the proposed programme will have identified the key publics (see section on analysis). Sometimes the key publics are apparent to the planner. If the planned programme is to support a product launch, then existing and potential customers will be a priority. However, groups are often not homogenous. It is incorrect to assume that all-embracing groups such as the *local community* comprise individuals who are similar or who will act in the same way. Within these groups there will be the 'active', 'aware', 'latent' and 'apathetic' publics that Grunig and Repper (1992) discuss. (Explained in Chapter 12.) They will have very different interests and concerns. It is likely that many individuals will belong to more than one stakeholding or public category too. Employees of an organisation may well be partners in a community relations campaign, or consume their organisation's products or services; they may even be shareholders.

TABLE 10.2 Examples of objectives

Issue	Objective for strategic programme	Objective for tactical campaign
Company viewed as environmentally irresponsible	Demonstrate environmental credentials	Promote company recycling scheme in local media
After-sales service perceived as slow and unresponsive	Create awareness of customer service facilities	Publicise guaranteed repair service and 24-hour customer helpline
Proposed legislation will damage environmentally sensitive areas	Change proposed legislation by lobbying government	Galvanise local pressure groups into action

box 10.1

Ways to segment publics

- By geographics – where they live, work
- By demographics – age, gender, income
- By psychographics – attitudes, opinions
- By group membership – e.g. clubs, societies, parents
- By overt and covert power – e.g. religious leader, information gatekeeper
- By role in decision process – e.g. financial manager, CEO

There are many ways in which stakeholders and publics can be segmented and the type of campaign will determine the best way to do that. For example, if a government wants to introduce a new benefit targeted at lower-income families, it makes sense to segment stakeholders by income and where they live. A charity wanting to start up a counselling service for refugees may wish to segment by ethnicity; a leisure company wanting to set up Saturday morning clubs for children will segment by age. (See Box 10.1.)

The practitioner has to decide the most appropriate ways to undertake the segmentation of stakeholders. Then it is important to move from the general to the particular. Broad categories must be divided into discrete groups. This could be done on the basis of the communication effort required for each group or on the basis of their power and influence.

The power/interest matrix (Figure 10.8) is used in strategic planning and can be readily transferred to the communication context. It categorises stakeholders depending on the amount of power they have to influence others and the level of interest they may have in a particular issue. Clearly the more power and interest they have, the more likely their actions are to impact on the organisation, so the support of this group is crucial. Johnson and Scholes (2002) point out that power comes from a number of sources including status in or outside the organisation, the ability to claim resources, (for example, investors money or internal budget) and the symbols of power that individuals have, for example use of titles.

Power \ Level of interest	Low	High
Low	A Minimal effort	B Keep informed
High	C Keep satisfied	D Key players

FIGURE 10.8 Power/interest matrix (*source:* adapted from Mendelow 1991, cited in Johnson and Scholes 2002: 208)

It is possible, even desirable at times, that stakeholders in one segment should move to another. For example, powerful, institutional investors often reside in segment C. It may be in times of crisis that the communicator will want to move them to segment D so that they can use their power and influence with others to support the organisation.

Similarly, just because a stakeholding group appears not to have much interest or power does not mean that it is not important. It may be desirable to stimulate local community groups located in segment B because they in turn are connected to more interested and powerful stakeholders, such as employees, in segment D.

By plotting stakeholders and publics in the power/interest grid it is possible to identify who the key blockers and facilitators of communication are likely to be and to react to this, for example, through more information or dialogue. It is also feasible to identify whether some stakeholders and publics should be repositioned (as above) and who should be maintained in their position.

It is informative to map stakeholders in a number of ways. For example, not only can current position and desired position be mapped, but a useful exercise is to map how stakeholders might move in relation to a developing issue and whether or not this is desirable, preventable or inevitable. Communication strategies can then be devised that accommodate these movements.

Once categorised according to a suitable method, the groups need to be prioritised and the amount of communication effort devoted to them apportioned. Figure 10.9 shows an example of how this might be done for a luxury wallpaper manufacturer.

The number of publics that are communicated with and the depth of that communication is likely to be limited by either a financial or time budget. However, it is important that all the key 'gatekeepers' or leaders of active groups are identified. They may well interpret information for others, act as advocates on the organisation's behalf and catalyse action. Key individuals may belong to more than one group, so public relations activity needs to be coordinated to ensure that there are no conflicting objectives, messages or tactics.

Messages or content

The fourth basic question is, 'What should be said?' Traditionally, public relations people have focused on messages. Heath (2000) says this could be explained partly because many practitioners have come from a

Grouping	Percentage of communication effort apportioned
Corporate	**20**
Shareholders (active)	8
Shareholders (latent)	2
Investment analysts	5
Financial press (active)	5
Customers	**30**
Large do-it-yourself retailers	10
Specialist wholesale decorating suppliers	6
Specialist retail outlets	6
Trade press	7
Trade exhibition organisers	1
Consumers	**15**
Consumer press	10
TV and radio specialist programme producers	5
Suppliers	**10**
Raw materials	
Major suppliers	6
Minor suppliers	4
Employees	**15**
Executives	2
Supervisors	2
Shopfloor workers	4
Designers and salesforce	3
Trade union leaders	2
Pensioners	2
Community	**10**
Neighbours	6
Schools	4

FIGURE 10.9 Prioritisation of effort for luxury wallpaper manufacturer

journalistic background, where 'getting the story' out is seen as important. This has led to a focus on 'message design and dissemination to achieve awareness, to inform, to persuade – even manipulate' (Heath 2000: 2).

There are many kinds of campaign where messages are critically important, especially in public information campaigns. So, a country's health department that wants to inform the public about aspects of health care often uses memorable messages. Similarly, road safety messages are encapsulated in slogans such as 'Don't drink and drive'.

Messages are important for four main reasons:

1 Messages assist the awareness and attitude-forming process. Publics who can repeat a message they have seen or heard are demonstrating that it has been received. They are also likely to have a view on it.
2 Messages demonstrate that the communication channels have been appropriate and that the message reached the recipient.
3 Messages are essential in the evaluation process. Messages intended for the media can be evaluated through media content analysis. If the same messages are picked up and repeated by the target public (e.g. through survey research), it demonstrates that the communication has been, at least in part, effective. What publics do with that assimilated message is the other half of the story.
4 Summarising an argument down to its bare essentials in a key message such as 'eat five fruits and vegetables every day' helps focus management minds and imposes discipline on woolly thinking.

However, messages have limitations. They indicate one-way communication: the originator simply checks to see if their communication has been received. If an organisation genuinely wants to enter into a *dialogue* with publics where the outcome will be mutually determined, messaging is not so appropriate. For example, if a new organisation wants to discuss with its employees what its values and goals should be, dialogue is required. Where dialogue is part of the overall purpose of communication, simplistic approaches to messaging are inappropriate. (For more on the different models of communication and their purpose, see Chapter 8.)

How then can programmes that involve dialogue be evaluated if messages are one of the ways to measure communication effectiveness? The obvious answer is: by the quality of the relationship that results from the dialogue. More on this later in the chapter.

Messaging or dialogue initiation is often undervalued or reduced to simple statements, but it is very important. It is the point of contact, providing the meaning between an organisation and its publics. It is 'given' by the organisation, and 'received' by its publics and vice versa. If messages are poorly conceived and the way they are conveyed poorly executed, it can be the end of the communication process. There are four steps in determining messages:

1 Take existing articulated perceptions that encapsulate the issue or problem. For example, it may be that the organisation is regarded as an old-fashioned employer.
2 Define what realistic shifts can be made in those perceptions. If working practices and policies have been completely overhauled, this needs explaining.
3 Identify elements of persuasion. Work on the basis of fact. For example, the organisation may have introduced a crèche and family-friendly work practices. The number of women managers may have increased by 25%; the organisation may have achieved Investors in People status and won a major training award. All these facts demonstrate

that the organisation is not an old-fashioned employer, and should form the platform for programme content. However, facts are rarely enough. People are not just rational beings, so it is important to add human emotion to these facts. People associate more readily with other people and their experiences rather than to purely factual information. For example, providing case studies that people can relate to in a human way and which illustrate how the organisation operates as a social as well as economic unit adds warmth and depth.

4 Ensure that the message or content is deliverable and credible through public relations activity rather than via advertising or direct mail.

See Box 10.2.

The integrity of the message is affected by a range of factors that can determine whether it is taken seriously or not, such as:

- format – should words or pictures be used?
- tone – serious or light-hearted?
- context – is it a day when there is bad news for the business or the country?
- timing – is it controllable and if so, has the most auspicious time been chosen?
- repetition – can the message be repeated often enough to be remembered, but not so often as to breed contempt?

Sometimes, circumstances dictate the format of the message and the medium in which it should be conveyed. For example, stock market information has to be provided in a prescribed form and a product recall dictates that advertising is used to get the message out quickly, in the required media and in an unmediated way.

Messages and content are key components of effective communication campaigns. Vague content leads to confusion and wasted effort. Carefully thought-through content is vital to understanding and dialogue – and essential to relationship building. (See Activity 10.2.)

activity 10.2

Message design

Devise an overarching message or slogan for a ‘grass roots’ or community-led campaign aimed at stopping children dropping litter outside the school premises. What would be a suitable sub-message for children? For parents?

Strategy and tactics

Strategy

The fifth basic question, ‘How should the message be communicated?’ falls into two parts: strategy and tactics. The temptation for the public relations planner is to move immediately to tactics because in many ways it is easier to think of a raft of ideas than it is to think about the rationale behind them. Implementation – where the tactics are put into action – is often the most exciting part of the planning process, and the most obviously creative. However, an underpinning strategy provides coherence and focus and is a clear driving force. It is the framework that guides the menu of activities. As Windahl et al. (1992: 20) state, communication planning ‘should include both systematic and creative elements. Both are essential to information/ communication work’.

There is much discussion on the meaning of ‘strategy’. Most books on strategic planning, for example Steyn and Puth (2000), who have applied strategy specifically to communication, provide several definitions and this in itself indicates that there is an issue around precise definitions. Strategy is described as: the ‘overall concept, approach or general plan’ (Cutlip et al. 2000: 378); the coordinating theme or factor; the guiding principle, or purpose; and ‘the big idea’, the rationale behind the programme. If an articulated strategy satisfies one or more of these elements it will be broadly satisfactory.

Strategy is dictated by, and springs from, the issues arising from the analysis of the problem and it is the foundation on which tactics are built. Tactics are

box 10.2 **Typical messages in corporate campaigns**

‘Company X is the largest manufacturer of widget Y in China, providing 3000 new jobs in two years.’
‘Company X has provided shareholder dividends above 5% for seven years.’
‘Company X is quoted in *Fortune* magazine as having a strong, forward-thinking board.’
‘Company X is committed to corporate social responsibility and has been included in the Dow Jones Sustainability Index since 2001. It sponsored the provision of 200 artificial limbs to victims of land-mines.’

	Example 1	Example 2	Example 3
Objective	Publicise new product	Establish organisation as thought leader	Encourage people to exercise
Strategy	Mount media relations campaign	Position as industry-leading think-tank	Drive home health policy through memorable message
Tactics	Press conference, press releases, exclusives, features, competition	Research reports, speaker platforms, information resource facility, online helpline, sponsorship of awards, etc.	Media campaign, posters, competitions, bus adverts, website, schools programme, etc.

FIGURE 10.10 Different types of strategy

the 'events, media, and methods used to implement the strategy' (Cutlip et al. 2000: 378). In the three examples in Figure 10.10, the first shows how strategy can describe the nature of, and summarise the tactical campaign for, a simple, single objective campaign. The second example is for a conceptual proposition, the third for a slogan-driven campaign encapsulating a key theme. All are equally valid.

Tactics

It is obvious that tactics should be linked to, and flow from, strategy. Indeed, having got the strategy correct, tactics should flow easily and naturally. Strategy should guide brainstorming and be used to reject activities that do not support the strategic intent or the programme objectives. There should be a clear link between objectives, strategy and tactics.

A level of caution is required when planning the tactics of a programme. It is easy for the practitioner to allow creative ideas to take over while ignoring the key aim and objectives. The aim is to get a programme that reaches the right people in sufficient numbers and that has the right level of impact to do the job required, all within acceptable costs and timescales. Sometimes that can be done with a single activity – for example, the international Live Aid concert on 13 July 1985 stimulated global awareness of starvation in Africa overnight.

More usually a raft of complementary tactics over a period of time is required. These will vary depending on the nature of the programme, so the practitioner will need to draw from a palette of tactics as appropriate. For example, if a company wants to launch new and highly visual products such as a range of expensive household accessories, it is important that tactics are selected that will show how these products look and feel. In this case, a range of tactics might include displays at exhibitions, product samples provided to journalists to encourage placement in the consumer media, CDs and websites showing the products in use, in-store demonstrations, brochures and high-quality posters.

In a different situation, for example, if the campaign involves lobbying over some aspect of financial legislation, quite different tactics, such as research reports, seminars, opinion former briefings, one-to-one meetings with members of parliament (MPs), would be more appropriate.

When designing the tactical elements of a campaign, two questions should be asked

1. Is the tactic *appropriate*? Will it reach the target publics? Will it have the right impact? Is it credible and influential? Does it suit the content in terms of creative treatment and compatibility with other techniques used?
2. Is the tactic *deliverable*? Can it be implemented successfully? Is there sufficient budget? Are the timescales correct? Are there the right people and expertise to implement it?

Figure 10.11 (overleaf) is a sample menu of activity that can be used in campaigns. (See also Chapter 3 on the role of the practitioner and Activity 10.3.)

activity 10.3

Public relations tactics

Bearing in mind the content of this section, list the tactics you would use to promote engagement rings. Then list the tactics you would use to encourage the customers of a utility company to pay online.

Feedback

To promote engagement rings, the tactics might include, for example, special shop openings (e.g. after office hours) targeted at couples to enable people to view and try on the rings. This would be the sensory component. Feature articles written for the local press would need to be more factual but would seek to stimulate interest in the shop openings. Photography will be an important part of the media effort. Timing, of course, would be around festive or traditionally romantic occasions such as New Year and St Valentine's day.

Media relations
Press conference
Press release
Articles and features
One-to-one briefings
Interviews
Background briefings/materials
Photography
Video news releases
Website
Email

Advertising (PR led)
Corporate
Product

Direct mail (PR led)
Annual report
Brochures/leaflets
Customer reports
External newsletters
General literature
(also multimedia material)

Exhibitions
Trade and public
Literature
Sampling
Demonstrations
Multimedia

Conferences
Multimedia
Literature
Hospitality

Community relations
Direct involvement
Gifts in kind
Sponsorship
Donations

Special events
AGMs
SGMs
Special occasions

Customer relations
Media relations
Direct mail
Advertising
Internet
Exhibitions
Retail outlets
Sponsorship
Product literature
Newsletter

Internal communication
Videos
Briefings
Newsletters
Quality guides
Compact disk interactive
Email
Intranet

Corporate identity
Design
Implementation

Sponsorship
Sport
Arts
Worthy causes

Lobbying
One-to-one briefings
Background material
Videos
Literature
Group briefings
Hospitality
CDs
Audio cassettes

Research
Organisations
Public relations programmes
Issues monitoring
Results monitoring

Crisis management
Planning
Implementation

Liaison
Internal (including counselling)
External

Financial relations
Annual report
Briefing materials
One-to-one briefing
Media relations
Hospitality
Internet
Extranet

FIGURE 10.11 A selection of public relations activities

Timescales and resources

Time

Time is a finite commodity and the life of a public relations practitioner is notoriously busy. Furthermore, public relations often involves the cooperation of others, and getting them to observe deadlines requires firmness and tact.

Deadlines can be externally imposed or internally driven by the organisation. Internal events may include the announcement of annual results, launching a new service or the appointment of a senior executive. External events may be major calendar dates, such as the Olympic Games, Chinese New Year or Thanksgiving.

To ensure deadlines are met, all the key elements of a project must be broken down into their individual parts and a timeline put against them. Check out Box 10.3, which contains a list of the main elements of a press facility visit.

Each of these elements will need its own action plan and timescale. Thus, preparing the visit areas may include commissioning display boards with photographs and text. That in turn will mean briefing photographers and printers, getting text approved by senior management and so on. It may also involve liaising with, for example, the marketing department for product literature, organising cleaners and arranging for porters to move furniture and erect the displays.

Having split the project down into its individual tasks, it is then useful to use techniques such as critical path analysis (CPA) (see Figure 10.12). There are also software packages available to help with project planning tasks like this (see www.microsoft.com/uk/office/experience). If tasks have to be done to a short timescale, time-saving measures will have to be implemented, such as employing a specialist agency to help or using existing display material.

Once the project is complete, it is vital to undertake a post-event analysis to see how the task could be done more efficiently and effectively another time. Certainly the planner should make a checklist of all the things undertaken so that it can be used for future events.

An annual activity plan allows the peaks and troughs of activity to be identified so that they can be resourced accordingly (see Figure 10.13). The times when activity is less intense can be used for reviewing or implementing other proactive plans.

From this annual planner it is clear that June will be a pressurised month, so extra help may be needed. May, on the other hand, looks fairly quiet, so this may be an ideal time for a team event to review plans and prepare for the future.

box 10.3

Checklist for a press facility visit

1. Draw up invitation list
2. Alert relevant departments
3. Select visit hosts
4. Book catering
5. Issue invitations
6. Prepare display materials
7. Write speeches
8. Prepare media packs
9. Brief visit hosts
10. Follow up invitations
11. Prepare visit areas
12. Collate final attendance list
13. Rehearse with visit hosts
14. Facilitate visit
15. Follow up

Resources

There are three areas of resourcing that underpin public relations work; human resources, implementation costs and equipment (Gregory 2000). Having the right staff skills and competencies as well as an adequate budget are critical to success. Skilled investor relations personnel, for example, are rarer and more expensive than general media relations staff (see Chapters 16 and 24 to gain an understanding of the skills involved in these areas). Generally speaking, a single practitioner with a few years experience can handle a broad-ranging programme of limited depth or a focused in-depth specialism, such as internal communication.

Ideally, the organisation decides its optimum communication programme and resources it accordingly. The reality is usually a compromise between the ideal and the actual budget allocated (Beard 2001). However, it has to be borne in mind that public relations is a relationship-driven activity and therefore people

Write speeches Speeches approved

Prepare display materials

4 Nov	6 Nov	11 Nov	12 Nov	13 Nov	14 Nov		28 Nov	29 Nov	30 Nov	1 Dec	2 Dec
Draw up invite list	Alert depts Select visit hosts	Book catering Send out invites		Brief visit hosts			Follow up invites	Prepare visit areas	Rehearsals Prepare final guest list	Facility visit	Follow up

Prepare press packs

FIGURE 10.12 Example of critical path analysis

Activity	**January**	**February**	**March**	**April**	**May**	**June**	**July**	**August**	**September**	**October**	**November**	**December**
One-to-one editor briefings	Trade press × 2	Consumer press × 2	Trade press × 2	Consumer press × 2		Consumer press × 1	Trade press × 1		Consumer press × 2	Trade press × 2		Local press
Advertorials with key journals		*The Grocer*		*Cosmopolitan*		*Sunday Times Magazine*		*Woman*		*Regional Consumer*		
News stories (including new products)	News story	Prepared foods	News story	Healthy options	News story	Summer fruits	News story	Barbeque foods	News story	Root veg	News story	Xmas goods
Seasonal themes			Spring promo			Outdoor life			Autumn promo			Winter warmers
Competitions		Trolley dash		Holiday bargains		Picnic hampers		Kids' adventure		Freezer filler		Santa's party
Exhibitions			Ideal Home	Local shows	Local shows	Great Yorkshire Show		Local shows	Local shows			

FIGURE 10.13 Annual media relations plan for a supermarket chain

are more valuable than materials. Media relations work survives without expensive press packs. It cannot survive without people.

When considering the implementation costs of a programme, public relations practitioners have a duty to be effective and efficient. So, for example, if an internal magazine is an appropriate medium, choices have to be made on the number of colours, quality of paper, frequency of publication, and so on. A full-colour, glossy, weekly magazine may be desirable, but would it be effective and efficient? On the other hand, a single-colour publication on cheap paper, issued once a quarter, may fail to make employees feel important or be frequent enough to be meaningful.

There are more difficult decisions to be made requiring knowledge of media (see Chapter 16). Email distribution of press releases is cheap, but of variable effect. Writing and negotiating exclusives with media outlets is time intensive and expensive, but the effects may be more powerful. Deciding on what is the most effective and efficient solution will depend on the public relations problem.

If budgets are restricted, it is important to think creatively about how a similar result can be obtained at a fraction of the cost. Joint ventures with complementary organisations, sponsorship and piggyback mailings (i.e. when one mailing such as an annual statement from a bank is used to include other information) should be considered. See Mini case study 10.2.

Sometimes it can be more effective and efficient to spend slightly more money. Run-ons (i.e. additional copies of a part or all of a publication) of a feature can provide a powerful promotional tool. Holding an employee conference off-site may cost more, but may guarantee their attention. Posting an analyst's briefing to other key shareholders may cost a little extra, but it may retain their support.

While not requiring excessive amounts of equipment to support their work, it is important that practitioners have the right technology to ensure quick and easy access to key stakeholders in a manner that is appropriate (Beard 2001).

Consultancy costs

If a public relations consultancy is hired, it is worth noting that consultancy charges vary. Consultancies

mini case study 10.2

3D mummy campaign

Being efficient and effective

Sometimes a little lateral thought and creativity can bring additional efficiency to public relations campaigns. Portfolio Communications looked closely at the needs of an existing client to come up with an imaginative and cost-effective campaign.

The 3D mummy

Bringing a 3000-year-old Egyptian mummy to life was an award winning public relations campaign by Portfolio Communications for supercomputing company SGI Silicon Graphics.

Portfolio's brief was to develop a campaign to popularise SGI's 3D visualisation technology, used by car designers, oil engineers and pharmaceutical companies to study large amounts of data in a visual, 3D format. The campaign needed to appeal to a broad set of media to reach the client's target audiences of ABC1 scientists, engineers and managers.

The campaign began by using a planning tool that contains information on all aspects of consumers' lifestyles. This revealed an excellent match between SGI's target audiences and their tendency to visit museums, with 42% of SGI's AB audience having visited a museum within the last 12 months. It also identified the key publications read by this audience, enabling careful targeting of the right publications for the campaign.

Portfolio approached The British Museum to explore ideas for applying the 3D technology to ancient antiquities. The collaboration saw a mummy recreated in 3D, a virtual unwrapping that was not only a world first, but also resulted in very exciting 3000-year-old discoveries.

The *Financial Times* was identified as a primary target publication read by both museum visitors and SGI customers. Armed with this information, Portfolio approached the *Financial Times* with an advance on the story and the campaign was then rolled out across print, broadcast and online media. The coverage achieved was widespread and included the *Financial Times*, *BBC 6 O'clock News*, BBC News 24, CNN and also key science media/programmes such as *Tomorrow's World*, *New Scientist*, Discovery Channel, *National Geographic* Channel and BBC Radio 4's *Material World*.

Above all, the huge success of the public relations campaign showed The British Museum the potential in bringing the 3D mummy to the general public. The Museum went on to purchase SGI technology as part of a public exhibition called *Mummy: the inside story*, which opened to the public in July 2004.

Source: www.portfoliocomms/mummycase.htm usually invoice fees, implementation costs and expenses. Fees can be charged in two ways. First, *advisory* fees, which cover advice, attending meetings, preparing reports, etc. Often this is billed at a fixed cost per month based on the amount of time spent – a *retainer*. Sometimes it is billed on a project basis. Second, *implementation* fees are charged to undertake the agreed programme of work and are in addition to advisory fees. There is usually a mark-up fee on bought in services such as print and photography where the consultancy bears the legal responsibility to deliver as contracted. The UK Public Relations Consultancy Association recommends a mark-up of 17.65% to cover things such as indemnity insurance. Value added tax (VAT) or other taxes may also be payable unless the consultancy is below a certain size.

It is important that planners maintain a careful watch on resources. It is a sign of good management if they are efficient and look for value-for-money solutions wherever possible. As an employee or consultant they will be judged on their ability to manage resources as well as being judged on programme effectiveness. Unfortunately, the creative services industry (of which public relations is part) is not well known for its performance in this area (Maconomy Report 2004).

Evaluation and review

Evaluation

Chapter 11 goes into detail about evaluation, but it is important to cover some basic principles here. Public relations is like any other business function. It is vital to know whether the planned programme has done what it set out to do and, if not, why not.

It needs to be stressed that evaluation is an ongoing process and should be considered at the objective-setting stage: it does not just happen at the end of the programme. All the planning approaches emphasise the importance of ongoing monitoring. Throughout its duration, practitioners will be regularly checking to see if the programme is on track. So, for example, media coverage will be evaluated monthly to see if the selected media are using the material supplied (e.g. feature articles or press releases) and to judge how they are using it.

When the programme is complete it will need to be evaluated to discover whether it has met its overall objectives. Sometimes that is relatively easy. For example, if the objective was to achieve a change in legislation and that has happened, then clearly it was successful. Sometimes the situation is rather more complicated. If the plan is to change societal attitudes towards people who have mental health problems, for example, it will take a long time: different publics will require different amounts and types of communicative effort; as a result the evaluation programme will need to be much more sophisticated and long term, employing formal social scientific research methods (see Chapter 11 for more detail).

Evaluation focuses effort, demonstrates effectiveness and efficiency and encourages good management and accountability. However, a recent survey undertaken by Metrica Research Ltd on behalf of the UK CIPR and the Communications Directors Forum (IPR 2004) found that only 55% of respondents from private organisations undertook systematic evaluation research, although almost all those in the public sector did.

There are a number of principles that can help to make evaluation easier:

- Setting SMART objectives: if objectives are clear and measurable, then judging whether they have been achieved is relatively easy.
- Building in evaluation from the start: if objectives are set with evaluation in mind, the task is simpler.
- Agreeing measurement criteria with whoever will be judging success.
- Evaluating and monitoring as the programme progresses: using ongoing monitoring as a management information tool; examining tactics and channels if things are not developing as the planner intends; revising the strategy if this fails.
- Taking an objective and a scientific approach: the requirement to provide facts and figures about the programme means that the planner may need training in research methods or to employ specialists who are.
- Evaluating processes: the planner needs to make sure they are *managing* the programme well, within budget and to timescales.
- Establishing open and transparent monitoring processes, through, for example, monthly review reports.

Evaluation is contentious among public relations practitioners. Fortunately, the UK Chartered Institute of Public Relations has produced a number of guides or toolkits that can help, but there is still some distance to go in agreeing a common standard. Recent work in America, published by the Institute for Public Relations in Florida, is focusing less on objective setting as the basis for evaluation and more on measuring the quality of relationships. Grunig and Hon's (1999) guide to measuring the quality of relationships indicates that judgements should be made on six key criteria; control, mutuality, trust, satisfaction, commitment, and exchange and commercial relationship. (For more on this, see Chapter 11.)

case study 10.1

The value of research: BT's 'Am I Listening?' campaign

BT's award winning 'Am I Listening?' campaign, launched in 2002, illustrates how correctly targeted and implemented research can help to define and evaluate a social marketing campaign.

In 2001, MORI research revealed that BT's CSR reputation had hit a plateau. As a leading CSR practitioner, the group embarked on a research and consultation process to help improve their reputation. The process began with an assessment of CSR perceptions and went on to identify a key social issue that has subsequently underpinned every strand of the campaign.

Key research was initially used to define the campaign:

Objective	Research	Result
Understand attitudes to CSR and expectations of BT	Extensive stakeholder research	Decision to focus on one business-relevant CSR issue
Establish the cause (three-phase process)	1000 UK adults polled Targeted employee consultation to review ideas Extensive cause research	Four areas identified, including health and children Narrowed to 'communications and young people' Created 150-page source book now used widely by other third parties
Identify campaign	Focus groups established and polled (adults, young people, employees)	Selected: 'Giving young people a voice on key social issues' ChildLine charity agreed as focus for first campaign phase
Listen to and understand young people's issues to help define the wider campaign	Largest ever research into views of young people: 2600 consulted Adults' views also sought	Provide ChildLine with information for strategic review Baseline measurement Extensive PR

The early consumer research showed that companies should focus on areas where their role would be instantly understood and in line with the business. In the case of BT, this meant focusing on its core business area of communications.

In terms of the issues of concern to BT's own customer base, research revealed a number of issues such as health, homelessness and young people. BT used this information and the previous research, as well as agreed critical success factors, to give a broad theme for a campaign around 'young people' and 'communications'.

BT then embarked on a phase of desktop research to explore possibilities. The source book was created and contains information on over 40 organisations active with young people and communications: existing research on young people's views about this subject, research from organisations about how to include young people in consultation, information on children's rights and other campaigns in the area.

This phase revealed: that there was an increasing but disparate amount of activity in this area; that this issue was high on the government agenda (and indeed international agenda); that there was little corporate activity in this area. BT spoke to a number of key organisations including the UK Youth Parliament in this phase of research and identified a campaign theme of helping give young people a voice.

case study 10.1 (continued)

In developing a strategy for the campaign, it became clear when BT went to consumer and employee groups that the wide concept of the campaign was hard to grasp. The example of ChildLine as a potential charity partner was then used and this had instant recognition and approval by the majority.

BT made a strategic decision that while the campaign's long-term aim was to give young people a voice, they should start where the need is the greatest, with those children who desperately need to be listened to.

This concept tested well among consumer and employee groups. There has long been a link with this charity and it is very much in line with what BT is all about. In addition could easily make the leap from ChildLine to wider issues.

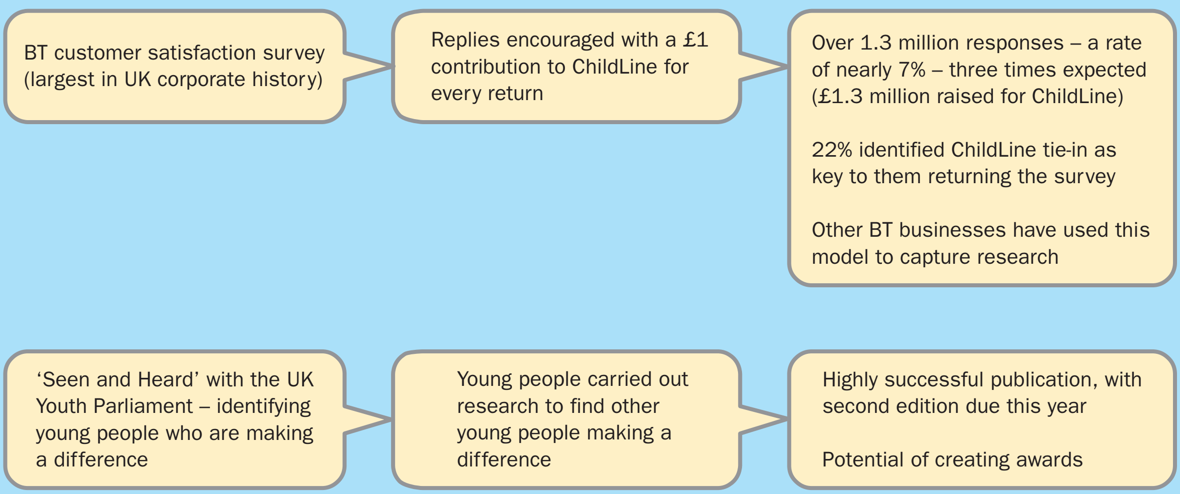
BT commissioned research into the views of young people in order to provide a baseline measure, to provide information to shape the campaign and to provide a platform for raising awareness on the issues. The key findings established that the majority of children and young people in the UK believe that their voices are not being heard and acted on. Adult opinion appears to back this up. Some 83% of adults say that it is very important to listen to children and young people, but only 57% agree that they do listen and act on what they hear. Significantly, the research also highlighted what happens when young people feel they are not listened to and what could happen if adults did listen more. The findings identified some marked differences between the things that young people want to speak out about and the issues that adults think young people are interested in. The research showed that young people would like to be 'active citizens' and speak out on how to run schools, how to improve their local services and how the police should deal with their age group.

The research launch was over-subscribed by important figures active in children's issues. Attendees included three MPs and three peers and selected representatives from health and education bodies, the police and key players in children's issues. Several proactive requests for meetings/shared work with BT were received. Media coverage was extensive, including *BBC Breakfast*, Channel 5 and the *Mirror*, as well as more than 187 regional radio and TV stations, with a circulation of 52 million.

BT have used the contacts made and the issues raised to form an ongoing part of the campaign. For example, BT invited the UK Youth Parliament to be part of the campaign steering group and have established a partnership with them focusing on the wider remit of the campaign; currently a series of round tables is being organised, designed to ensure that young people have their voices heard by opinion formers such as police, doctors and education specialists. BT is now in its second year of research. Case studies are being produced for a publication of examples of how young people are getting their voices heard on issues that are important to them.

The initial research also helped BT to define their campaign strategy and facilitated:

- Helping ChildLine reach its goal of answering more calls through fundraising and sharing core skills and technical expertise.
- Developing a programme of listening to young people through research and consultation.
- Reviewing BT's own policies and procedures for communicating with young people.
- Raising awareness of the issue and the benefits of listening to children and young people through a series of events/activities and media platforms.
- Creating projects that will demonstrate the benefits gained when the voices of young people are heard.
- Ensuring that the campaign becomes a catalyst for coordinated action with organisations that share



case study 10.1 (continued)

BT's goal and working with children and young people to lobby organisations and institutions to listen.

Research continues to be a key campaign tool. Highlights include:

In addition to being used directly as a campaign tool, the research keeps the campaign aligned with the views of young people. It monitors employee awareness and involvement, gauges the impact had by opinion formers and is used to evaluate improvement in BT's CSR reputation.

This multifaceted approach to research has defined BT's award-winning campaign from the outset and continues to guide its ongoing development.

For more information, visit www.bt.com/listening

Review

While evaluation is both an ongoing and end-of-campaign process, a thorough review of all public relations activity should be undertaken regularly, but on a less frequent basis, every 12 months or so. As part of this, the external and internal environment should be surveyed systematically to ensure that all issues have been captured and any new ones accommodated. Campaign strategies should be tested to see if they are still entirely appropriate. Certainly tactics should be reviewed to see if they need refreshing with any new creative input and to ensure that they are addressing the needs of the target publics.

Sometimes new internal or external issues or factors force a major review. For example: new regulations may be introduced by government; the organisation may have merged with another organisation; the chief executive may have retired; a well-organised pressure group may be raising important issues that require changes to the way the organisation operates; or there may be large budget cuts.

Where a major review is required, it is important to take a holistic approach. Programmes always need to be dynamic and flexible enough to embrace opportunities and challenges, but sometime a fundamental reappraisal has to take place. If that is the case, all the stages in the planning process outlined in this chapter need to be taken again. It may be time consuming and demanding, but having done it the planner can be assured that they will have built the foundation for success. (See case study 10.1.)

Summary

This chapter has sought to show that *planning* communication is critical to public relations success. Successful public relations programmes do not just happen. Professional communicators plan. Planning puts them in control. It puts order and purpose into a busy and potentially chaotic and reactive working life. Seeing a planned public relations programme come to life is exciting and rewarding. It also clearly demonstrates to organisational peers and employers that public relations can make a real, measurable difference.

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