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The Need for Strategic Public Relations Management

Chapter Contents

Strategic public relations planning and research techniques have evolved into the most powerful tools available to public relations practitioners. Today's competitive business environment increasingly puts pressure on communication managers to demonstrate in a measurable way how the results from public relations programs benefit the organizations they serve. Practitioners well prepared to use the tools available to them can enjoy bigger budgets, more autonomy in decision making, and greater support from management. Managers relying on an intuitive model of public relations practice based on their knowledge of media markets and a well-developed network of contacts, however, tend to have less credibility, enjoy less autonomy, receive lower priority, and suffer greater risk of cost cutting that threatens job security.

SURVIVING AMID FIERCE COMPETITION

The increasingly competitive business and social environment makes it critical for public relations managers to understand how to apply public relations planning, research, and program-evaluation practices that help ensure success and accountability. Research-based public relations practices enable managers to solve complex problems, set and achieve or exceed goals and objectives, track the opinions and beliefs of key publics, and employ program strategies with confidence that they will have the intended results. Although the use of research in public relations management cannot guarantee program success, it allows practitioners to maximize their abilities and move beyond creative reactions to scientific management. A more strategic management style can help control the ways a situation will develop and the outcomes practitioners achieve in those situations.

Consider the following scenarios in which communication professionals can use research-based planning to develop effective strategies for solving a problem and demonstrate program success.

Community Relations

You are the public affairs director for the largest employer in a community. The local media have been running stories about problems at the company, claiming management has lost sight of its unique role in the community. The board of directors wants a clear understanding of public perceptions of the company. It also wants to develop new programs that will better serve the community and improve community relations. You are not convinced the company needs to establish new programs as much as it needs to support its existing programs. How do you determine the opinions and attitudes of community members toward the company? How do you measure community perceptions of existing programs, as well as community interest in new programs?

Special Events Planning and Promotion

You are the manager of a performing arts coliseum. The coliseum has lost money on several events over the past 2 years and now is threatened by competition from a new community theater scheduled for construction in 2 years. Coliseum management and its board of directors sense they are out of touch with the community and are unsure how to address the situation. How can management determine community programming interests and begin to reorient itself to the needs and desires of community members without wasting valuable resources?

Political Campaign

You are the campaign manager for a state senatorial candidate. The mostly rural district has 75,000 registered voters, many of whom work as farmers or in farming-related businesses and industries. The election is 9 months away, and the candidates are engaged in a close contest. How do you track changes in voters' perceptions of your candidate as the election nears?

Nonprofit

You are a public relations practitioner at a small, nonprofit organization. Your new assignment is to rescue a local special event with a troubled history. The event, sponsored by the local chamber of commerce, is supposed to raise money for your organization while attracting visitors who patronize local businesses in your community. The most recent event was a disaster, however, despite a strong media relations effort. Because of low attendance, the organization barely broke even on the event, and local businesses have lost interest in participating next year as sponsors. How do you find out what went wrong and make next year's event a success?

Development

You are a senior development officer at a major university. Development has become increasingly important as state budgets have dwindled. The university is making preparations for the largest development campaign in its history. Unfortunately, students let their partying get out of hand after a big football win over cross-state rivals, and the fracas attracted national media attention. You are concerned the negative media attention will significantly hinder university development efforts. You need to understand the opinions and attitudes of key segments of the public to develop a quick plan that will allow you to respond in an effective manner. How do you determine the responses of donors and nondonors to news of the disturbance?

Public relations practitioners face problems like these on a regular basis, and the small problems can help organizations deal with bigger ones when they arise. J. Wayne Leonard, the chief executive of Entergy, the power company serving the New Orleans area, said his company felt prepared for the unprecedented catastrophe of 2005's Hurricane Katrina because "we have the skills and planning to deal with catastrophe because we deal with it on a small scale all the time." Besides the company's efforts to restore power to 1.1 million customers, his management response included evacuation for his own employees, assurances that their jobs would be preserved, coordination with government officials, and making sure

"front-line" employees were "empowered to make common-sense decisions" (Feder, 2005).

STRATEGIC VERSUS TACTICAL DECISION MAKING

According to Dick Martin (2005), the retired executive vice president of public relations for AT&T, successful public relations management requires acting as "an honest broker" who understands the concerns of internal and external stakeholders "and can synthesize them into a perspective the CEO can actually use." Martin goes on to say, "it means making forecasts instead of compiling yesterday's clips, and backing up those predictions with plans for dealing with them" (p. 23). In other words, successful public relations management requires strategic research and strategic planning.

Research helps practitioners acquire accurate information quickly at a relatively low cost to aid them in sophisticated planning and problem solving every day. When practitioners respond to organizational problems and challenges by engaging in media relations campaigns, they typically respond tactically instead of strategically. Strategic decision making is goal directed and guided by an organization's larger purpose. According to Fred Nickols (2000), "strategy is the bridge between policy or high-order goals on the one hand and tactics or concrete actions on the other." Tactical decision making, on the other hand, focuses more on day-to-day actions and therefore tends to be more response oriented in nature. Tactical decision making can allow public relations programs and campaigns to drift aimlessly, lacking direction or purpose. Practitioners may use media clips as the basis for program accountability in this instance, but the benefits of clip-based evaluation are limited. It is impossible, for example, for practitioners to determine message effect on targeted audiences' opinions, attitudes, or behavior using clips. Practitioners find their ability to solve organizations' problems through such a response also severely limited because no basis exists for determining the extent of a problem or evaluating the results of their programs.

Finally, organizational managers can become frustrated in their attempts to adapt to changing internal and external environments because practitioners have no basis for understanding and accomplishing the steps necessary to successfully address or accommodate stakeholders' opinions. The result is that practitioners' success may be limited. They typically end up in a defensive position with external and internal audiences, having little basis for effectively communicating the benefits of their campaigns and programs to organizational management.

When practitioners respond to problems and challenges strategically instead of tactically, they have a much greater likelihood of helping organizations meet their challenges, solve or avoid protracted problems, and adjust to the expectations of key stakeholders in mutually beneficial ways. Research and planning are not simple remedies for every organizational

problem. No amount of research or planning, for example, can rescue an organization from the consequences of its own poor performance. Nevertheless, practitioners' use of research, planning, and evaluation contribute to an informed organizational decision-making process with a greater likelihood of success. When practitioners use these tools, their programs and campaigns can have clear goals that direct program implementation. Practitioners can use formative research to set initial benchmarks for goals and objectives and to determine campaign strategy. Practitioners using tactics purposefully and selectively can communicate the benefits of public relations campaigns and programs to organizational management more easily. Ultimately, practitioners have the opportunity to enjoy greater success at placing their organizations in stable, mutually beneficial relationships with key stakeholders.

As Cutlip, Center, and Broom (2006) noted, *public relations* is a management function that identifies, establishes, and maintains mutually beneficial relationships between an organization and the publics on whom its success or failure depends. This definition and many others like it, although simple on their face, actually suggest a complex set of processes. For public relations practitioners to operate as managers, for example, they cannot simply input the decisions made by others in an organization. They need to assert themselves as members of what is commonly called the *dominant coalition*, those with the authority to make decisions and set policy. In other words, they need to lead organizations and not just act as so-called service providers. Dozier, Grunig, and Grunig (1995) stated, "Just as communication flows one way, so too does influence" (p. 77). What Dozier et al. meant by this is that service providers implement decisions made by others instead of influencing organizational decision making. As a result, practitioners operating as service providers commonly are limited to advocating organizational viewpoints. This prevents them from helping the organization build and maintain long-term relationships that ensure long-term organizational success, which requires some adjustment to public perceptions and needs.

Agencies think they do better at building long-term relationships than their clients do. According to a 2004 survey of about 600 public relations executives and about 87 corporate public relations executives by the Counselors Academy and sponsored by *PR News,* agencies often believe they act strategically, but clients think agencies' actions display more of a tactical orientation ("PR Measurement," 2004). According to 73% of the clients surveyed, at least half of the services agencies provide should be strategic in nature. Less than 33% however, believe that PR agencies deliver that type of focus. Meanwhile, a full 87% of agencies agree that their emphasis should tilt toward strategy, and 62% think they deliver on this priority. Both clients and agencies agreed that "more meaningful" measurement would improve their relationships, although they differed on other actions that should take priority.

THE OFTEN MISUNDERSTOOD ROLE
OF PUBLIC RELATIONS

Public relations practices encompass a broad range of activities that can lead to confusion about how public relations differs from marketing and advertising. The goals of each differ in important ways. Advertising focuses on selling products to consumers through controlled placement of paid media messages, a narrow and specific role. Marketing, including integrated marketing communications, often uses public relations techniques to sell products and services. The marketing role is broader than that of advertising but still focuses on consumers rather than on all the key publics of an organization. Public relations, on the other hand, strives to help organizations develop and preserve the variety of relationships that ensure long-term success, broader goals than those of advertising or marketing. These stakeholders can include not only consumers but also government regulators, community members, shareholders, members of the media, employees, and others. Therefore, although public relations techniques often are employed in marketing and advertising, it is more appropriate for organizational management to treat public relations as the umbrella under which other activities, including marketing and advertising, occur.

Many practitioners struggle with the fact that this is difficult to put into practice, and they often find their role misunderstood. A survey of members of the New York chapter of the Public Relations Society of America (PRSA), for example, found that 92% believed that most people do not understand what public relations is ("PR Pros," 1998). Public relations also suffers from low credibility. In the New York survey, 93% of the professionals enjoyed their work, and 68% were proud of their field, but 67% believed the field did not have a good image, and 65% believed they were not as respected as members of other professions. This image problem was supported by another credibility study undertaken by PRSA, which found the public relations specialist ranked almost at the bottom of a list of approximately 50 professions (Public Relations Society of America, 1999).

To improve their stature within organizations and among a broad range of publics, public relations professionals must take a planned, strategic approach to their programs and problem solving. When operating as subordinates instead of organizational leaders, practitioners implement decisions made by others instead of contributing to organizational decision making. In short, they work at a tactical level. In 2004, only 25% of agencies believed that they were "very involved" in helping clients research, discuss, and decide the business goals relevant to their communication programs ("While Agencies," 2004). As leading experts continue to emphasize, communication specialists who operate as technicians cannot effectively build public consensus or position an organization on issues of strategic importance

(e.g., Broom & Dozier, 1990; Dozier et al., 1995; "Keys," 1998; "M&As," 1998; "Personal competency," 1998; "Reputation," 1994).

USING RESEARCH TO ENHANCE THE CREDIBILITY OF PUBLIC RELATIONS

One reason communication specialists experience frustration and insufficient credibility appears to lie in how they conduct and apply research. According to Bruce Jeffries-Fox (Fox 2004), much public relations research serves only as window dressing. The situation seems to have changed little since a national survey of 300 professionals in 1996 found that managers see themselves in a double bind (Pinkleton, Austin, & Dixon, 1999). Professionals reported clients and CEOs as enthusiastic about research but reluctant about providing the budget to pay for it. Meanwhile, the more the managers performed a specific type of research, the less they valued it, and the more they valued a particular research method, the less they employed it. As shown in Table 1.1, practitioners relied most on measures of volume of media pickups and tracking of media coverage, which they found the least beneficial.

On the other hand, practitioners relied least on measures of changes in awareness, knowledge, attitudes, sales, and behavior, which they found the most valuable. The results also showed that the professionals almost uniformly embraced research as vital for proving that public relations programs are effective, but less than half agreed that research is accepted as an important part of public relations. A 1995 PRSA survey also found that 92% believed research was talked about more than used (Public Relations Society of America, 1995). Finally, although 68% of practitioners

TABLE 1.1
Use and Value of Research Measures Among
Public Relations Practitioners

Research Measure	Mean for Use (Rank)	Mean for Perceived Value (Rank)
Advertising equivalency	3.71 (9)	3.37 (9)
Volume of media pickups	5.43 (2)	4.57 (8)
Favorable media treatment	5.35 (3)	4.96 (7)
Media coverage	5.47 (1)	5.19 (5)
Changes in awareness	4.95 (4)	5.64 (4)
Changes in knowledge	4.85 (5)	5.90 (2)
Changes in attitudes	4.74 (6)	5.77 (3)
Changes in sales	4.07 (8)	5.08 (6)
Changes in behavior	4.64 (7)	6.02 (1)

Note. All measures on 7-point scales, with 1 indicating less use or value and 7 indicating more use or value.

attending a seminar on PR measurement said they do evaluations, only 23% said their research was providing useful results ("The New," 1999). This pattern of results suggests that constraints prevent communication professionals from doing enough research, or at least enough of the type of research that clients and senior executives find compelling. It comes as little surprise, then, that more than third of respondents to a survey in 2004 indicated that credibility of the profession would be a major issue affecting them in 2005 ("2005 Challenge," 2005).

In 2005, measurement still ranked as a top concern. According to two surveys (Cone & Feldman, 2004; "PR and Sales," 2005), a majority of practitioners indicated that they measure results but that the majority of budgeting for measurement methods still concentrated on publicity placement. Another survey found that practitioners considered measurement and accountability the biggest issues facing them in 2005 ("2005 Challenge," 2005).

According to Carole Cone, reporting on a *PR News/*Counselors Academy survey of 364 public relations executives (Cone & Feldman, 2004), budgeting challenges greatly damage accountability efforts. Cone asserted that stand-alone funding for public relations research rarely rose above $2,000, although some larger companies were beginning to set a higher standard. But if most proposed research focuses on tactical-level publicity instead of on the demonstration of effects, why should clients devote more money to the enterprise? Todd Defren of Shift Communications ("PR and Sales," 2005) noted that public relations executives often have emphasized "wrong-headed thinking about how to measure PR success, such as buzz phrases like 'Share of Voice' or 'Ad Value Equivalency.' Everyone's trying to measure PR the way other people measure other marketing programs, and it's not working" (p. 3). Measuring the wrong things can make it look as if communication programs accomplish less than they really do.

Despite the challenges, the field seems to have made some progress on measurement issues. Some have called the new millenium the *Neolithic Age* for public relations measurement, a time of tremendous change ("Measurement," 2003). Experts assert that measurement has become more mainstream and that agencies that effectively incorporate measurement into their proposals obtain bigger budgets overall. According to Barr and colleagues ("PR Measurement," 2004), more practitioners are focusing on the demonstration of appropriate communication outcomes. This demonstration requires finding something simple that connects communication efforts to better business performance. The authors emphasized that this requires some creativity to go beyond standard return on investment (ROI) measures. "ROI is one of the most over-used terms in the business," noted Barr, a founder of a PR measurement firm (p. 6).

In other words, moving from a tactical approach to a strategic management style requires skillful use of research and planning techniques.

Discussions among senior public relations practitioners at professional meetings and in the trade press consistently emphasize the need for managers to demonstrate forward thinking by anticipating instead of reacting to problems and opportunities. In an increasingly crowded and complex media and social environment, practitioners need to design innovative programs they can prove will work. Gaining autonomy and the support and confidence of clients and upper management for their ideas requires several things. These include the ability to provide evidence supporting the need for communication programs, reasons why proposed strategies will work, and evidence at the end of a program that the program has indeed worked. In short, strategic public relations management demands a set of abilities that require competence in planning principles, research methods, communication theories, and effective communication presentation skills. According to Jeffrey Ory of Deveney Communications (Miller, 2005), public relations professionals often do a poor job of explaining how effective public relations can be measured and, therefore, how public relations can be used effectively.

Some communication experts such as Jeffries-Fox (2004) state that fear is one of the biggest constraints preventing managers from doing a better job of using research to guide strategic planning and demonstrate results. The purpose of this book is to allay those fears and replace them with skills and confidence. You do not have to be a statistical wizard to conduct and interpret meaningful research. In addition, when you do research strategically, you do not need to fear what the results will show. Even poor results for one program can point the way to more effective future planning when research is sensitive enough to demonstrate not just *whether* a program has an effect but also *how*. "It's not a question of pass or fail," according to *PR News* ("Measurement," 2003).

ORGANIZATION OF THE BOOK

The organization of this book is designed to provide communication managers with the range of tools required for the development, communication, and evaluation of effective programs. The toolkit includes basics of the strategic planning process, a general overview plus a range of specific guidelines for managers to use when hiring or performing their own research, theoretical perspectives that can help managers interpret research and develop effective strategies and tactics, and guidelines for the presentation of research findings and program plans.

Part I of this book presents a framework for planning that managers can apply to guide decision making. Chapter 2 addresses mission statement development, problem statement creation, and situation analysis, all of which form the basis for program development. Chapter 3 introduces the

elements of the strategic planning process, which include goals, objectives, strategies, and tactics. Chapter 4 focuses on how to determine research needs and develop a research plan to gather information that will help practitioners plan their program.

Part II addresses when and how to do research for public relations planning and evaluation. Chapter 5 covers basic issues to consider when developing research plans. Chapter 6 provides the basics of sampling using terms and concepts accessible to those uninitiated in social science methods. Chapter 7 introduces the range of informal methods available to the communication manager, whereas chapter 8 provides some detail about how to conduct focus groups. Chapter 9 introduces the range of formal methods commonly used in communication research, and chapter 10 covers the nuances of survey research specifically. Chapter 11 focuses on how to construct questionnaires that provide trustworthy and useful information, and chapter 12 discusses how to collect and analyze questionnaire data.

Part III explains how communication theory can assist the manager in strategic planning. Chapter 13 introduces public relations and communication theory and demonstrates its relevance to daily practice. Chapter 14 covers the range of theories available to help managers develop effective program strategies, and chapter 15 boils down decades of research into a set of principles and applications for practical use.

Part IV discusses how to present a persuasive case for public relations programming, with chapter 16 explaining the elements of a public relations proposal and providing a set of writing and presentation tips.

Experts in public relations seem to agree that public relations practitioners have the most success when they operate from a research-based, strategic management style. This book is designed not only to help novices through the strategic planning process but also to provide the depth required for an experienced professional looking for a concise reference. It is intended for use at either the undergraduate or graduate level and has been written to be accessible to those on a self-guided tour. The goal of this book is to provide professionals and advanced public relations practitioners with the information they need to engage in strategic public relations management. Communication specialists who apply the skills explained in this book should secure a place for public relations and communication management at the leadership level in organizational decision making.