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Elements of the Campaign Recipe

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After communication managers have performed precampaign research, they can revise the problem statement and situation analysis and go on to design the campaign. Keep in mind that change is constant, thus all planning documents must respond to changes in resources, context, and available information. The manager will revise a problem statement if research demonstrates the initial problem diagnosis overstates, understates, or misstates the problem. Similarly, managers can revise the situation analysis as the situation changes. It follows that the campaign plan, too, may require adjustment occasionally. If, however, you have done thorough precampaign research, the campaign plan rarely will need a major change.

GOALS

The campaign plan includes at least four levels of information, all presented in writing. The first is the *goal*. A goal is a conceptual statement of what you plan to achieve. The goal is essentially a set of statements that together negate the problem. For example, if the problem for an organization

is a lack of awareness, the goal will focus on increasing awareness. If the problem is a lack of credibility, the goal will focus on increasing credibility. If the problem is a lack of volunteer involvement, a series of goals may focus on recruiting new volunteers, increasing involvement among existing volunteers, and increasing opportunities for volunteer activity. Managers can provide clients with long-term or short-term goals, depending on the context of a program or campaign.

A goal statement includes the following elements:

1. *The word "to."* This signals to the reader that an action statement will follow. It also demonstrates a results orientation. Both of these characteristics make goals easy for busy clients and CEOs to understand quickly.

2. *An active verb.* This demonstrates that a proposed communication plan will have specific effects. The verb should reflect an effect rather than an action. In other words, the goal should not promise to do something such as disseminate newsletters; instead, it should promise to accomplish something, such as improving customer loyalty. Appropriate verbs include increase, decrease, and maintain. Occasionally, others are appropriate, such as initiate or eliminate (Table 3.1).

3. *A conceptual, quantifiable statement of the desired outcome.* This specifies what will be changed and by how much. The focus may be on outcomes such as knowledge, beliefs, opinions, behaviors, sales figures, membership figures, or donation levels. This signals the reader how the manager plans to measure success. As a result, this outcome must be quantifiable in some way. For example, levels of employee satisfaction may be quantified in terms of a combination of sick time, complaints, longevity, work quality, and self-reported opinions. Each proposed measure on its own may not adequately represent employee satisfaction, but as a group they seem appropriate. Each proposed measure will become a stated objective of the campaign. Increasing levels of employee satisfaction, therefore, can be the focus of a goal statement. Each goal should focus on only one outcome. A program designed to change several outcomes should state each outcome as a separate goal.

4. *Identification of relevant target publics.* The client should not only see at a glance what is to be changed but also know among whom it will change. A single communication campaign cannot promise to improve a company's reputation among every individual in the world; the manager must offer some parameters. This will guide the development of strategy, which will differ depending on the target public.

For example, Blockbuster and CIM, Inc., created a Silver Anvil Award-winning campaign to launch video sales of the *Titanic* movie. The Silver Anvil Award is given annually by the Public Relations Society of America (PRSA) to honor communication programs that incorporate sound research,

TABLE 3.1
Active Verbs Appropriate for Goals and Objectives

Address	Enhance	Persuade	Supply
Administer	Enlarge	Plan	Systematize
Analyze	Enlist	Position	Tabulate
Approve	Establish	Prepare	Teach
Arrange	Evaluate	Present	Tell
Assign	Examine	Preside	Trace
Attain	Expand	Protect	Track
Authorize	Finish	Provide	Train
Build	Gain	Publish	Verify
Calculate	Generate	Raise	Write
Catalog	Govern	Reassure	
Communicate	Group	Recommend	
Complete	Guide	Record	
Conceive	Hire	Recruit	
Conduct	Identify	Rectify	
Confine	Implement	Reduce	
Contract	Improve	Regain	
Control	Increase	Release	
Convince	Index	Remove	
Coordinate	Inform	Request	
Correct	Initiate	Require	
Create	Institute	Research	
Decide	Interview	Reshape	
Decrease	Investigate	Retain	
Delegate	Justify	Review	
Demonstrate	Keep	Revise	
Design	Locate	Schedule	
Develop	Maintain	Secure	
Diminish	Make	Select	
Direct	Moderate	Sort	
Disapprove	Motivate	Start	
Distribute	Negotiate	Stimulate	
Document	Notify	Straighten	
Draft	Obtain	Strengthen	
Earn	Organize	Submit	
Educate	Outline	Summarize	
Employ	Overcome	Supervise	

planning, execution, and evaluation (Sidebar 3.1). Goals for the *Titanic* campaign included, “to capitalize on consumers’ fascination with the *Titanic* to attract customers to Blockbuster Video stores” and “to generate media coverage of Blockbuster’s guaranteed availability of *Titanic*.”

OBJECTIVES

Although these Blockbuster goals are not *measurable*, they are *quantifiable*. In other words, they cannot count “capitalizing on consumers’ fascination

SIDEBAR 3.1

Campaign Excellence

A Survey of Silver Anvil Award Winners Compares Current PR Practice With Planning, Campaign Theory

Each year, thousands of organizations across the United States develop and implement PR campaigns. Some of these campaigns fail. Some are modestly successful, and some achieve smashing success.

Each year, some 650 of these campaigns are submitted for consideration for a Silver Anvil Award, PRSA's recognition of the very best in strategic PR planning and implementation. Of these, about 45 will be awarded the profession's highest recognition. What makes these campaigns so outstanding? Are there common characteristics among Silver Anvil Award-winning campaigns? And can they be identified, interpreted and used to help professionals produce better campaigns for their companies and clients?

These are the questions that a 2002 study of Silver Anvil Award-winning campaigns from 2000 and 2001 sought to answer. This study, which I conducted with Courtney C. Bosworth, Ph.D., assistant professor of advertising and public relations at Florida International University, compares current PR practices in the profession with PR planning and campaign theory. Adding to the study are the observations of some of the profession's leading practitioners—people who judge Silver Anvil entries and, as a result, see the best and worst in PR programming today.

The results are revealing. Although every campaign has practical constraints and technical flaws, campaigns with certain characteristics—notably thorough research and benchmarking, clear objectives, research-based strategies, and documented results—have a good chance of rising to the highest level of campaign excellence. This study of Silver Anvil winners reveals the most common campaign-planning practices of this elite group, as well as shortcomings even great campaigns share that the profession should address in the future.

The Study

The purpose of the study was to determine if there are any common characteristics of effective PR campaigns. A content analysis of all aspects of PR campaigns was conducted, looking at primary and secondary research methods used, objectives set, communications tactics implemented, and output and outcome evaluation methods reported. In all, some 121 variables typically present in PR campaigns were assessed, used key words and phrases appearing in the two-page summaries of the campaigns.

A random sample of 33 campaigns was analyzed in depth out of winning entries. The campaigns were distributed among the 15 Silver Anvil categories, and among subcategories that included business products, business services, government, associations/nonprofit organizations, and partnerships.

SIDEBAR 3.1 (Continued)

Budgets: Myths vs. Realities

There's no question that big-budget programs are well represented among Silver Anvil-winning campaigns. But, according to Lew Carter, managing director for affiliate relations worldwide for Manning, Selvage & Lee, what counts is not the size of the budget, but the way it is used. When asked what distinguishes a great campaign from a typical one, he says, "innovative strategies and the efficient use of budget."

The analysis of winning campaigns bears this out. The largest number of winning entries (29 percent) are not in the highest budget category studied. They are in the \$100,000–\$199,000 budget range—a healthy expenditure but not overly large, especially since most of these campaigns spanned large geographic regions and used innovative tactics to stretch their dollars. The second-highest category is programs of \$500,000 and above (25 percent—these tended to be national or global in scope), while programs in the \$300,000–\$399,000 category rank third (12 percent).

Research: Critical to Building Strategy

Judges say that too many campaigns lack solid research. "I've seen campaigns that seem to contradict the research," says Jennifer Acord, regional manager for public relations and media events for Avon Products Inc. "The best campaigns use research to develop the objectives, create the strategy and provide clear benchmarks for evaluation."

Mitch Head, APR, Fellow PRSA, managing director for Golin/Harris Atlanta and former chair of the Silver Anvil Committee, has also noticed the lack of research.

"Everyone does tactics well," he says. "To me, a great campaign is one that has a great nugget of research that leads to a great strategic approach."

What types of research do award-winning campaigns depend on? Top campaigns depend on primary research techniques that involve personal contact with target audiences. Interviews with, and observations of, key audiences are the most popular form of primary research (65 percent of campaigns used this technique), while telephone surveys rank second (57 percent), focus groups rank third (38 percent), and impersonal mail surveys a distant fourth (12 percent). Internet surveys are used in only 6 percent of campaigns. Fax surveys are definitely out of favor—no campaign reported using this technique.

With secondary research, literature searches (44 percent) and competitive analysis (42 percent) rank as the most frequently used techniques. Used with less frequency are archival research (25 percent), syndicated databases (24 percent), organizational research (24 percent), media audits (22 percent) and sales and market share data (22 percent). General online research is used in 19 percent of campaigns.

When it comes to examining audiences, half of the winning campaigns use demographic profiles. Thirty-three percent use psychographic profiles, while only 13 percent report using geographic profiles.

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SIDEBAR 3.1 (Continued)

Experimental research is done with less frequency. Messages are tested in 37 percent of winning campaigns, while specific communications vehicles are tested in 18 percent of campaigns, media testing occurs in 13 percent of campaigns and products are tested in 6 percent of campaigns.

Benchmarking: Key to Proving Results

In order to attribute an outcome to the PR campaign, the campaign must be benchmarked. However, after studying the type of benchmarking research typically done prior to the launch of a campaign, even some of the top campaigns came up short.

“The thing that distinguishes the great campaigns is that they ‘move the needle’—and are able to clearly show that it is public relations that did the heavy lifting,” says Christopher K. Veronda, APR, manager of communications and public affairs for Eastman Kodak Company and a longtime Silver Anvil judge.

Only 45 percent of campaigns benchmark awareness prior to launch. This is significant because 79 percent of the campaigns seek to increase awareness, meaning 34 percent of the campaigns seeking to increase awareness fail to establish their starting point. Other types of benchmark research done include benchmarking perceptions (41 percent benchmarked perceptions, while 63 percent of campaigns sought to change perceptions), attitudes (40 percent benchmarked/12 percent sought to change) and opinions (27 percent benchmarked/28 percent sought to change).

Objectives: What Are We Trying to Do?

The most important aspect of a campaign is the objective, says Gerard F. Corbett, APR, Fellow PRSA, chairman of PRSA’s 2003 Honors and Awards Committee and vice president of Hitachi America, Ltd. “You need to identify where you want to be at the end of the day and what needs to be accomplished when all is said and done,” he says.

Four out of five Silver Anvil campaigns studied sought to change behavior. And yet, in order to change behavior, a hierarchy of effects must occur that involves the creation of awareness, informing and educating audiences, changing opinions (persuading) and changing attitudes.

The campaigns studied did not systematically set multiple objectives to reflect the process of behavior change. Although 82 percent had behavior-based objectives and 79 percent had awareness- and visibility-based objectives, only 28 percent had opinion-based objectives and only 12 percent had attitude-based objectives. Practitioners might consider working backward—identifying the behavior objective for the campaign, then thinking through the attitude-change, opinion-change and awareness-change objectives necessary to produce the behavior.

SIDEBAR 3.1 (Continued)

How Well Are Objectives Written?

Judges agree that poorly written objectives are one of the top reasons campaigns are eliminated from Silver Anvil competition. Among the ones that win, however, what does the study find?

Winning campaigns still reveal gaps that should be addressed by the profession. While 96 percent show a clear tie to the organization's mission and goals and 75 percent specify the nature of the desired change, only 43 percent specify the time frame for the change and only 35 percent specify the amount of change sought. In order for objectives to be adequately expressed and, ultimately, an outcome to be measured, all four elements must be present.

"Many losing Silver Anvil entries did not have the kind of objectives that can later be measured and evaluated," says Catherine Pacheco, APR, president of Pacheco Rodriguez Public Relations. "Once we read the first half of the entry and find this wanting, we know the last half will be worse. After all, how can you possibly measure the success of a campaign if you do not clearly specify what you are out to achieve?"

Measuring Results

While the results are the most important aspect of a good campaign, judges say that too often entries will only demonstrate the number of clips, meetings held, and the like, instead of evaluating the impact of the program and actions taken by relevant audiences.

It is accepted in the profession today that assessing bottom-line results, or outcomes, is more important than assessing campaign activities, or outputs. The study shows a wide variety of both types of evaluation taking place.

Top output evaluation methods include documentation of messages placed in the media (73 percent of campaigns), documentation of participation in events or activities (62 percent), documentation of the number of campaign events implemented (52 percent) and documentation of content of messages placed (50 percent). "I see thinly veiled attempts (in losing entries) to gauge the success of a campaign solely based on the number of news clips that are generated," Pacheco. "If it's one of several markers, that's great, but to call a campaign a best practice, it better contain other measurements of success than just clips."

In the more important arena of outcome evaluation, 87 percent of campaigns document behavior change. However, only 24 percent document attitude change and only 18 percent document opinion change—both necessary precursors of behavior change, unless a latent desire to behave in the desired direction already exists in the target audiences. This suggests that the profession should pay closer attention to evaluating opinion and attitude change after a campaign is implemented, in order to more fully understand if the behavior was produced as the result of communication effects or some other factor.

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SIDEBAR 3.1 (Continued)

To do so is a struggle, however, when companies or clients, satisfied with the results of a campaign, will not offer additional funds for follow-up research. Practitioners should be prepared to argue that such research will add to the company's knowledge base and, in the long run, pay off with more efficient use of dollars in future campaigns.

Interestingly, 75 percent of campaigns document that the audience received the intended message and 67 percent document that the audience understood the message, but only 12 percent document that the audience retained the message. This suggests more attention should be given to documenting the long-term effects of communication efforts on the intended audiences.

The X Factor: Does It Exist?

Asked whether there is an "X" factor that sets excellent campaigns apart from those that are merely good, solid ones, the overwhelming response from Silver Anvil judges is yes. But that factor, they say, ranges from daring creative approaches to solid implementation.

"What distinguishes a great campaign is a genuinely creative approach to a worthy challenge that is executed flawlessly and yields significant, measurable results," says Pat Pollino, APR, Fellow PRSA, and vice president for marketing and communication for Mercer Management Consulting, Inc. "To borrow an analogy from pro football, anyone can diagram a power sweep, but it takes a team like Vince Lombardi's Green Bay Packers to pull it off successfully."

A dramatic or daring approach sets outstanding campaigns apart, says Head. Dreaming up something creative is "hard to do in this day and age, when everything seems to have already been done," he says.

Corbett agrees and further defines the X factor that winning campaigns share.

"The great campaigns are those that are strategic in nature, have a well-defined goal, are very targeted and have results that stand out like a crystal in the sun," says Corbett. "I believe that there is an X factor, although it is difficult to discern at first glance. It is the chemistry that makes the program gel. It could be an out-of-the-box idea; it could be the people involved or the manner in which the campaign was implemented. Or it could be many factors woven together like a resilient fabric."

Veronda doesn't believe there is an X factor. "It's solid implementation of the four-step process," he says. "Some of our critics would say you should just look at results, but to show it was public relations that moved the needle, you had to do the upfront research and establish the benchmarks."

The best public relations does not impress the reader as merely public relations, but approaches the business problem of the organization, says Clarke Caywood, Ph.D., graduate professor of integrated marketing communications at Northwestern University. "It uses the richness of the field to solve problems and create new opportunities to increase revenues or reduce costs and contribute to the triple bottom line of social, environmental and financial

SIDEBAR 3.1 (Continued)

security of the organization, its employees, investors and other stakeholders," he says.

But bottom-line results, he says, is the X factor. "I'd like to know how behavior was changed. For example, did sales increase? Was there greater turnout at an event? What I want to know is how the PR program made a difference for the organization."

Final Thoughts on Campaign Planning

The bottom line for campaign planning? Focus on those aspects of campaign planning that will help you achieve your goal. Do good, solid research that benchmarks your starting point; use that research to build your strategy; set complete objectives that specify type, amount, and time frame for change; and document your outcomes. Sprinkle in a heavy dose of creativity, both in problem-solving and tactical execution, and efficient use of funding, and you are well on your way to producing an outstanding PR campaign.

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From "A Survey of Silver Anvil Award Winners Compares Current PR Practice With Planning, Campaign Theory," *Public Relations Strategist*, by C. B. Ahles, 2003 (Summer).

with the *Titanic*," which is an idea, but they can count things that represent that idea, such as the number of people who come to Blockbuster as a result of a *Titanic* promotion. They cannot count "media coverage," per se, but they can count the number of articles, column inches, and minutes of broadcast that mention the movie and Blockbuster together. Nager and Allen (1984) wrote that it helps to think of a goal as a *directional statement*, such as planning to "go north." You cannot ever "arrive" at "north," because north is an idea, a concept. It is relative to where you are now, or where you used to be, or where you will be some other time. So you have to supply some context if you want to turn the direction into some sort of destination so that you will be able to say, "I have arrived!" You can go north from someplace, and you can go specific places located in a northerly direction, but to know you have done it right, you need to give yourself some checkpoints. You need to know where you are starting out—known in communication campaigns as the *baseline*—and you need to know where you want to end up—known as the *objective*.

If the goal has promised to “improve employee morale,” the manager will have created a directional statement but will not yet have any concrete destinations to guide campaign planning and provide accountability. You never will arrive at “improving morale.” You can, however, find things to measure that will represent improvements in morale, just as you can find cities that represent north. These things that you measure—your destinations—will serve as your objectives.

In the Blockbuster example, the outcomes for the goals include connecting use of Blockbuster stores with the *Titanic* movie and connecting media coverage of the movie with its availability at Blockbuster. The manager cannot count either of these outcomes. To quantify these ideas, such as media coverage, you might count the number of news stories that contain references to both the movie and the video store. Or you might count the number of on-air promotions and contests connecting the movie and its availability at Blockbuster. To measure high visibility, you might count the number of news stories that make the front page of the entertainment section of the newspaper, or you might be satisfied with the number of stories that make it into the news at all. All of these would be *measurable outcomes*, or destinations, for your image and visibility campaign.

An objective, then, is a measurable destination that represents the achievement of a campaign goal. Much confusion exists regarding objectives, most likely because several types of objectives exist. Many communication managers, for example, write conceptual statements (goals) and call them objectives. A true objective, however, is specific and measurable, stating not what the campaign will do, but rather what a campaign will accomplish. Three types of objectives exist.

Global objectives focus on general program outcomes. They summarize the overall effect of a campaign. For example, a global objective might be to obtain the necessary legislative support to enable a company to proceed with a planned expansion. Although concrete—the expansion either proceeds or does not—the objective does not specify the details that have to be in place for the expansion to take place. For example, the company needs to have enough sympathetic legislators win election or re-election in the next election. In addition, someone has to write and introduce the legislation. Advocacy groups with alternative views need to be persuaded or countered. These process-oriented or task-oriented outcomes are known as *intermediate objectives*. Finally, the campaign may state *terminal objectives*, which provide specific measurable or observable results to the campaign, measured by behaviors or actions, such as at least 51 senators voting for the passage of a particular bill.

An objective must include the following elements:

1. *The word “to.”* This signals that a promise of accountability follows.
2. *An active verb.* As before, this indicates that something specific will happen as a result of the communication program (Table 3.2; see Table 3.1).

TABLE 3.2
Active Verbs Appropriate for Objectives

Administer	Finish	Reduce
Approve	Gain	Regain
Assign	Generate	Request
Attain	Hire	Retain
Authorize	Implement	Schedule
Catalog	Improve	Secure
Complete	Increase	Select
Conduct	Institute	Start
Create	Interview	Submit
Decrease	Locate	Tabulate
Develop	Make	
Distribute	Obtain	
Draft	Present	
Earn	Provide	
Employ	Publish	
Enlarge	Raise	
Enlist	Record	
Establish	Recruit	

Note. You can insert a number after each verb to indicate a specific, measurable amount of change.

3. *The “criterion outcome” or measurable destination.* This puts the focus on a concrete “operationalization” of the idea presented in a goal. This outcome must be measurable or reliably observable. Each objective focuses on a single criterion outcome, which means that several objectives may correspond to quantify a single goal statement. The wording of the criterion outcome must make clear what measurement technique is required for accountability. For example, an objective promising “to increase self-reported confidence in the institution” by a certain amount requires a survey; an objective pledging “to increase the number of participants in professional development seminars by 20%” requires an attendance record.

4. *The relevant target public.* Some objectives, such as those focused on raising awareness, may not be relevant to all target publics in a campaign. Therefore, to avoid overpromising, specify which objectives relate to which publics.

5. *The amount of change expected.* This critical piece of information distinguishes the objective from the goal by providing concrete verification of goal attainment. This can take the form of a number or a percentage. The amount of designated change must be ambitious enough to require real improvement but also be realistically attainable. Stating too high a level can impress a client in a pitch meeting but can make a competent campaign look like a failure. Understating the level can lead a client to think the campaign will be a sham and not worth the investment. As a result, objectives

are difficult to write. However effective the campaign strategies may be, the objectives ultimately determine whether a campaign is a success or a failure.

How much change is necessary or realistic can be determined only through research and still may require the best judgment of the communication manager. In addition, objectives sometimes may require negotiation, particularly when they are set on the basis of political judgments or intuition instead of on the basis of research. Sometimes clients impose minimum levels of change, and sometimes these levels are not realistic. The Washington State Legislature, for example, determined in 1997 that all state universities had to improve student retention and graduation rates by specified amounts. The universities knew that they would not be able to achieve the amounts. Ironically, the ability to achieve some of the stated objectives, such as decreasing time until graduation, would be compromised by increases in enrollment and retention, which were the focus of other objectives. The university administrators knew that many students drop out or change institutions because they are struggling, thus keeping them from leaving would probably hurt overall time-to-graduation rates. The universities' challenge, as a result, was to make their best effort to achieve the stated objectives while acquiring evidence to convince the legislators that alternative objectives would be more appropriate. Although the universities had to sacrifice some state funding because they failed to meet the original objectives, they were successful in guiding the legislature to more reasonable objectives during the next legislative session.

6. *A target date or deadline.* This seals the promise of accountability and is an essential element of the objective.

Note how concrete and specific the objective is. Many managers find objectives discomfiting because they represent a clear promise. Objectives state in no uncertain terms what will be accomplished and by when. The obvious danger is promising too much. The manager, however, has only two viable alternatives: make promises that can be kept or make no promises. Because promises provide accountability, they make or break your reputation. To make no promises in a bottom-line-oriented environment keeps public relations marginalized and powerless. As a result, the only choice for the successful communication manager is to make promises that can be kept. The only way to do this—to determine realistic objectives—is through research. Blockbuster was able to set objectives and develop strategy based on continuing market research of theater attendance and video sales, customers' video rental and purchase habits, the usefulness of incentives, and the attraction of "being among the first" to buy the movie. It also used the movie attendance research to determine the target audience, which was dominated by young females. More sample outcomes appear in Table 3.3.

TABLE 3.3

Examples of Communication Program Outcomes (from 2004 Silver Anvil Award Winners)

Goal:	To build anticipation and excitement for the opening of Wild Reef in April 2003.
Objective:	To increase the awareness of local residents and tourists by 20% that Wild Reef was opening in April.
Objective:	To increase annual attendance by 10%.
Goal:	To achieve public awareness of the location, concept and content of the King Library among the general public and the University community.
Objective:	To attract 300-500 guests to a black-tie gala and 10,000 to the dedication/community celebration.
Objective:	To entice 700,000 visitors to the library by December 31, 2003 – 100,000 more than normal at the old libraries.
Goal:	To dramatically expand consumer base without losing share from core consumers.
Objective:	To generate 250 million gross media impressions among mainstream consumers in 2003.
Objective:	To maintain 82% market share among core consumers in the natural foods channel during campaign.
Objective:	To use public relations to increase Silk sales to \$300 million in 2003.

Note. “Dr. Martin Luther King, Jr. Library—Check It Out!,” City of San Jose and San Jose State University, “Selling More Without Selling Out: Keeping Soymilk Cool,” C. L. Spong & White Wave, “Shedd Sharks Go Wild,” Shedd Aquarium, Public Communications Inc.

Objectives Drive Evaluation

Every objective, if written properly, necessitates some form of evaluation and dictates the form the evaluation should take. In the case of Blockbuster’s *Titanic* promotional campaign, some of the objectives included the following:

- To develop a promotion/special event that attracts at least 500,000 customers to Blockbuster throughout the United States and encourage them to purchase or rent *Titanic* at Blockbuster sooner than at other video stores
- To obtain at least \$2 million in free media exposure for Blockbuster during the launch
- To determine how many customers came to Blockbuster stores as a result of the *Titanic* promotion

Blockbuster was able to count the number of people who attended the special midnight launch of *Titanic* video sales, including the number who lined up around the block ahead of time. Blockbuster counted the average transaction amount during the sale, which increased 321% over that of a normal business day. It also did research, which established that nearly 50% of consumers who purchased the movie during the event would not

have done so if the store hours had not been extended. To determine how much media coverage was worth, Blockbuster applied a formula to the print and video coverage of the event, which it estimated at \$9 million.

The Importance of Coordinating Objectives With Evaluation

The objective should signal the appropriate form of evaluation. As an example of coordinating objectives with evaluation, the American Medical Women's Association (AMWA) and Fleishman Hillard, Inc., teamed up to increase awareness, diagnosis, and treatment of thyroid disease. The campaign took place in response to figures indicating that more than half of the estimated 13 million Americans with thyroid disease, most of whom are women, remain undiagnosed. Untreated, thyroid disease can cause cholesterol problems, osteoporosis, and infertility. Meanwhile, a simple blood test can detect the disease, and treatment is straightforward. As a result, AMWA and Fleishman Hillard's stated objective was to increase the number of women being tested for thyroid disease by at least 10% in the first 15 months of the campaign. This objective dictated that campaign success would depend on tracking figures of women tested for thyroid disease. The campaign documented an increase of more than 40% in the number of women tested. The campaign included other measures of success as well, such as the number of total prescriptions of thyroid treatment medication, which increased by 10% and indicated that more women were being treated for thyroid disease.

The campaign had several associated results as well. More than 6,600 individuals were screened during local market screening events, at a rate of more than 300 people per hour. AMWA and Fleishman Hillard achieved exposure to more than 100 million people with media coverage that included national coverage on television shows such as *Good Morning America*, CNN, Fox, and MSNBC; national coverage in print venues such as the Associated Press, *USA Today*, *The Washington Post*, and several magazines; and local print and broadcast coverage in various markets. A television public service announcement was broadcast 3,800 times, reaching an estimated 128 million viewers. A radio public service announcement reached an estimated 40 million listeners. The campaign also brought the issue to the attention of Congress through invited testimony and visits to four key Congressional members' home districts. These achievements, however striking, would not in themselves demonstrate campaign success as promised. If the stated objective promises behavior change in the form of increased blood tests, success must be measured in those terms.

It may seem unfair that a campaign might achieve results but still seem like a failure if the ultimate objective is not met. This makes it especially useful to include intermediate and terminal objectives along with global

objectives for a campaign. In the case of the thyroid disorder campaign, an appropriate global objective would be to track treatment of thyroid disease and the incidences of related osteoporosis, cholesterol problems, and birth defects, which the campaign managers documented. An appropriate terminal objective would be to increase testing, which the campaign planners documented. Appropriate intermediate objectives would include media impressions, congressional hearings, and local screening successes, which they also documented. Even if the ultimate campaign objectives had not been met, the campaign managers would be able to show that progress had been made and that future efforts might have more striking results. Indeed, the success of the thyroid campaign led to a campaign expansion that attracted the collaboration of additional health organizations.

STRATEGIES

Apparent success depends on how objectives are stated. Actual success depends on the competent use of appropriate *strategy*. If the goal represents the direction we plan to go and the objective represents destinations at which we plan to arrive, then strategies represent how we plan to get there. A *strategy* is a statement of the communication themes or vehicles that will be used to accomplish a specific objective. It represents an overall plan of action that will tie together each action taken to implement the campaign. The communication manager constructs strategies based on the following elements:

1. *Available data*. This includes the situation analysis and all the research that has gone into creating it. It also includes the manager's knowledge from previous experience with an organization and with communication campaigns. In the case of the thyroid campaign, available data included research by Fleishman Hillard with consumers, health care professionals, media, managed care organizers, professional societies, and consumer groups. It found that only 30% of women had been tested for thyroid disease in 1996, that nearly 90% of people did not know that thyroid problems could do things such as elevate cholesterol levels, and that although half of all women experienced three or more symptoms associated with a thyroid disorder 75% of them did not discuss the symptoms with a doctor.

2. *Communication and public relations principles*. This includes knowledge of the public relations function and its parameters. Fleishman Hillard knew it could help by boosting public awareness, bringing the issue to the attention of Congress, and promoting testing among individuals at risk (women). It had expertise in all of these areas of promotion.

3. *Communication and persuasion theories*. The body of knowledge in the social sciences can provide you with the ability to make hypotheses, or likely informed guesses, about the types of strategies that will accomplish

the stated objective and be relevant to a situation. Social science theories are essentially explanations of how and why things happen the way they do. In short, theories can tell you how people are likely to react to your campaign and why.

In the case of the thyroid campaign, Fleishman Hillard realized that the problem was a lack of awareness instead of active resistance to testing. People demonstrated they did not know much about the importance of the thyroid gland, its effects, or how easy it was to diagnose and treat thyroid problems. As a result, Fleishman Hillard knew it needed to build knowledge. It also knew from persuasion theories that people are more likely to take action if they understand the relevance of an issue and if they can see that taking action is both easy and effective. As a result, Fleishman Hillard developed three related strategies:

1. Build consumer knowledge, particularly among women, about the thyroid gland's function and effect on the body.
2. Humanize thyroid disease by demonstrating its effect on quality of life and risks to long-term health.
3. Demonstrate the ease and simplicity of a sensitive thyroid stimulating hormone (TSH) test to detect thyroid dysfunction.

TACTICS

These strategies, of course, are ideas for guidance instead of a list of actions to implement. They are, in fact, counterparts to goals, which are ideas about campaign results. The communication campaign, therefore, also must include an action counterpart to the objective. These are called *tactics* and are the tasks that must be accomplished to achieve a stated objective. The tactics are the specifics of your recipe. They are, essentially, job assignments. Tactics include the following:

- The task
- Parties responsible for completing the task
- Deadline for completion of the task

Tactics include the development of specific communication vehicles, such as public service announcements, logos, brochures, training materials, and special events. For Fleishman Hillard, the tactics included development of an engaging theme, identification of a celebrity spokesperson (Gail Devers, the Olympic gold medalist who had suffered with undiagnosed thyroid problems for 3 years), development of high-profile events that attract both national and local media coverage, implementation of special events such as a VIP breakfast to bring the spokesperson and physicians

together with key members of Congress, a free TSH testing event on Capitol Hill, and more. Each stated tactic related to a specific strategy that was designed to achieve a stated objective, which demonstrated the accomplishment of a stated goal.

THE STRATEGIC PLANNING LADDER

As the thyroid campaign illustrates, the campaign plan becomes a tightly organized set of specific tasks that put carefully selected strategies into action to accomplish stated objectives representing organizational goals that enable an organization to achieve its mission. To make sure all elements of the campaign plan are necessary and appropriate, it helps to think of the progression of specificity as a ladder (Figs. 3.1 and 3.2). When going up the ladder, such as considering the appropriateness of a tactic, ask "Why are we doing this?" In other words, does every action have a stated purpose?

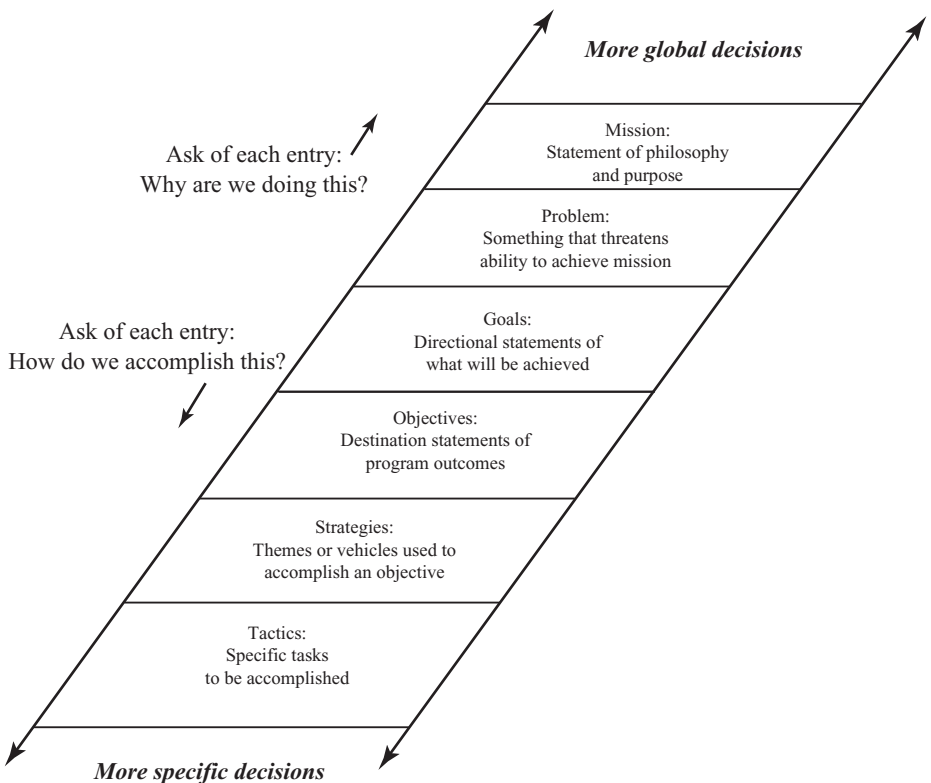


FIG. 3.1. The strategic planning ladder. How the mission, problem statements, goals, objectives, strategies, and tactics relate to one another.

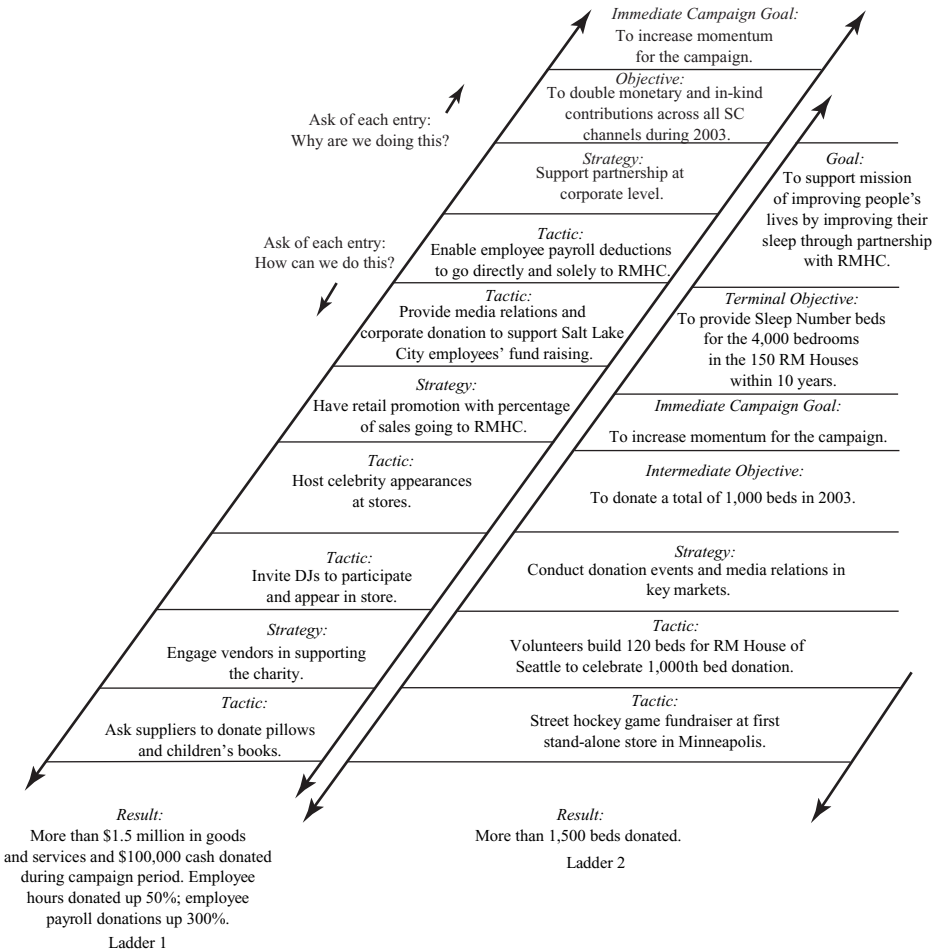


FIG. 3.2. The strategic planning ladder. Examples of how goals, objectives, strategies, and tactics relate to one another as demonstrated by the "Catching ZZs for Charity" campaign implemented by Select Comfort and Carmichael Lynch Spong in 2003. A communication program may have a number of interrelated "ladders." RM, Ronald McDonald; RMHC, Ronald McDonald House Charities; SC, Select Comfort.

The answer to the why question for a tactic should be a strategy. The answer for a strategy should be an objective. The answer for an objective should be a goal, and the answer for a goal should be the problem, to which the answer is the mission. Why do we need to produce a brochure? Because we need to provide information to potential applicants to spark their interest and gain their confidence. Why do we need an informational campaign? Because we need to increase applications from this target public

by 30%. Why do we need to increase applications? Because we want to increase representation from this target public in our program. Why do we want to increase their representation? Because our organization strives to serve the entire community, and they have not been represented in the same proportion in which they exist in the community.

In reverse, going down the ladder, the manager should ask “How will we accomplish this?” To solve a problem requires a goal statement. To achieve the goal requires objectives. To meet the objectives requires a strategy, and each strategy requires tactics to put it into action. How can we increase representation of the target public in our program? We can increase the number of applications by the next deadline date. How can we increase the applications? We can develop an information campaign targeting interested community members from the target group. How can we implement the campaign? Among other things, we can develop brochures.

INITIATING THE PLANNING PROCESS

The communication program plan represents the culmination of much research, analysis, and expertise. Sometimes it can be difficult to determine where to begin the planning process. Client representatives may have nonspecific or conflicting ideas, and communication personnel may have varying interests in and interpretations of the issue as well. As a result, it can be useful to begin the planning process with an old-fashioned brainstorming session. Several brainstorming techniques exist. One especially effective strategy is called *story boarding*.

Story boarding, originally developed by the Walt Disney Corp. to design *Steamboat Willie*, is a highly visible, highly interactive way of gathering and sorting ideas. *Story boarding* refers to the process of creating the story that will guide strategic planning. In effect, it is a way to approach the process of analyzing the situation and identifying the strengths and opportunities that will inform decision making. Besides helping participants work through a problem, the technique provides a mechanism for tracking the decision-making process so others can see how collaborators arrived at a final decision. This gives confidence to participants who can be reminded of the factors that produced a decision, and it adds credibility to the decisions made because they are based on clearly presented evidence.

Managers can use story boards for four purposes:

1. *Planning* is used to outline the steps required to reach a specific result, such as preparing for a special event.
2. *Idea* is used to develop a concept or a theme for a specific purpose.
3. *Communication* is used to determine who needs to know something, what they need to know, and how best to interact with them.

4. *Organization* is used to determine who will take responsibility for designated tasks, and how to work together as departments, individuals, or organizations to accomplish a plan.

Story boarding uses a facilitated creative thinking process to guide brainstorming. The process includes three stages of idea generation, critical review, and consensus building to create a shared vision of a plan. It is a little like a focus group, requiring a facilitator to guide discussion and encourage freedom of thought. During the idea-generation stage, participants offer ideas for issues such as the who, what, where, when, why, and how of a problem; the identification of important target publics, opportunities, and constraints for a campaign; and the creation of campaign themes. Each idea is noted on an index card, which gets pinned or taped onto walls or tackable surfaces. During critical review, the group sifts through ideas to organize, refine, and prioritize them. Finally, during consensus building, the participants try to arrive at an agreement for the plan, idea, communication strategy, or organization. The rules for the creative thinking process include the following:

- The more ideas, the better
- No criticism
- Hitchhiking is good (triggering ideas from others' ideas)
- Spelling does not count
- Handwriting does not count
- One idea per card
- Yell out each idea during brainstorming

This technique helped the state of Washington develop a campaign focused on alcohol abuse prevention that required the cooperation of a wide spectrum of individuals from organizations with various agendas and perspectives. Representatives from the Department of Alcohol and Substance Abuse (DASA), the Governor's budgeting office, the state liquor control board, the public schools, higher education, and other organizations all gathered to determine how to focus the campaign and how to assign responsibilities. Beginning from DASA's stated goal, to "teach that alcohol is a drug," participants shared their personal experience, knowledge of research, and awareness of practical constraints such as how to ensure the cooperation of important stakeholders. The discussion gradually identified an agreed-upon target group: parents of children younger than the usual age of first experimentation. From there, the group developed an action plan for developing benchmark and formative research, which led to development of campaign materials.

The research for the campaign included a statewide survey of parents with children between the ages of 3 and 10 that would serve as a benchmark for later evaluation and would provide useful information for media relations activities. It also included a series of focus groups used to test the proposed message strategies (See Chapter 8).

The goal of the campaign was to educate parents of young children about talking to their kids about alcohol at an early age. A process goal was to equip parents with the knowledge and awareness that they can be the most significant source of help in influencing their children's attitudes and behavior toward responsible drinking habits. Objectives included distributing 100,000 informational brochures to parents over a 2-year period, increasing awareness of an "alcohol is a drug" message among Washington parents by 10% each year over a 2-year period, securing statewide media commitments to run \$250,000 of pro bono advertising in support of the campaign each year, increasing by 10% the number of Washington parents who rank alcohol use by kids as a "serious problem," and increasing by 10% the awareness of "the harmful effects of alcohol use by children."

The strategy for the campaign included the development of a multiyear, multimedia statewide campaign focusing on increasing parents' knowledge that alcohol is a drug and that they can be the most powerful deterrent and source of help to their children regarding potential alcohol use. The strategy also included securing cooperative funding sources to sustain the campaign for 2 years; to maintain high visibility through the use of public relations and media relations activities throughout the campaign; and to coordinate all campaign activities at state, county, and local levels to ensure a successful launch.

The five primary tactics for the campaign included implementing the statewide surveys; developing three distinctly different conceptual treatments of the "alcohol is a drug" theme; obtaining commitments from magazines, newspapers, newsletters, television stations, and radio stations; developing a poster and a parent guide; and securing co-op partners.

The campaign achieved its objectives, distributing 103,265 informational brochures to parents over a 2-year period, increasing awareness from 53% to 62% (an increase of 17%), and securing more than \$250,000 of pro bono advertising in support of the campaign. The campaign did not greatly increase the percentage of Washington parents who were "extremely concerned" about alcohol use by kids and considered it a "serious problem," which already was at 45% and averaged 5.8 on a 7-point scale. The number of parents who mentioned alcohol as the "most used drug" by children increased by 13%, rising from 46% to 52% among parents who recalled the campaign. The postcampaign survey demonstrated that 72% of parents saw or heard one of the public service advertisements produced for the campaign.

FINAL THOUGHTS

The DASA campaign embodied all of the essential elements of scientific program planning, from the development of the situation analysis at the beginning of the campaign to the demonstration of accountability at the end of the campaign. The use of careful research and a clear plan ensured that every campaign tactic fulfilled a necessary strategy and that every strategy responded to a desired objective. Every objective realized a relevant goal, and the goals took aim at the problem of underage drinking. The clarity of the MBO process makes it easy for an outside observer to understand the purpose of the campaign, the reasons for actions taken in pursuit of campaign goals, and the results achieved at campaign's end. The MBO technique cannot guarantee success for the practitioner, but the focus it provides will make success a more likely outcome. Because of its overt emphasis on accountability, the MBO technique also makes an achievement impossible to dismiss.