

IV

THE SUCCESSFUL PITCH AND FOLLOW-THROUGH

16

Presenting Campaigns, Program Proposals, and Research Reports

Chapter Contents

- Introductory Material
- Executive Summary
- Situation Analysis and Research Needs
- Research Goals
- Research Objectives
- Research Hypotheses
- Research Strategies
- Results (With Minimal Interpretation)
- Revised Situation Analysis
- Proposed Communication Plan
- Conclusion
- References and Appendixes
- The Successful Writer's Mind-Set
- Oral Presentations
- Final Thoughts

Communication practitioners can expand their role in organizational decision making based on their important contributions to the organization's success, but they need to present their ideas effectively to do so. The communication manager's ideas achieve success only when they appear credible and successful to those who must approve project plans, budgets, and personnel decisions. Clients who cannot understand your research or who have not become convinced that your ideas will work will not hire you

for the job. Managers therefore need to treat the campaign plan or public relations program proposal as a kind of communication campaign. For those presenting research reports rather than complete plans, keep in mind that the client wants to understand the implications and limitations of the research you have done. Both situations require clear, confident, and forthright communication.

Communication Plans, Public Relations Proposals, and Research Reports

Every agency and organization will have its own customs and expectations for oral and written presentations. Some like a lot of detail in written form, and some prefer brief proposals in an outline format. This chapter presents a generic, detailed format for a complete communication plan, shown in Table 16.1, so that practitioners have guidelines for the most formal campaign or program proposals. The format can be modified to fit a specific organization's needs. The parts include appropriate introductory material, an executive summary, a situation analysis and explanation of research needs, a list of research goals, a list of research objectives, a statement of research hypotheses, an explanation of research strategies, a description of the research results, a revised situation analysis that provides an explanation of the implications of the research findings, a proposed communication plan, a conclusion, and any relevant references and appendixes. The *research report* is similar to the communication plan or program proposal in that it includes everything up to the proposed communication plan. Instead of including a detailed plan, the research report includes the revised situation analysis or implications section and then segues straight to the conclusion.

INTRODUCTORY MATERIAL

Communication plans often will include a brief cover letter, sometimes called a *transmittal letter*. The cover letter for an internal document, such as a report submitted to a CEO by a department, can take the form of a memo. The cover letter states that the proposal requested is being submitted. The letter expresses appreciation to clients for the opportunity to work with them. It also makes it possible to highlight unique, surprising, or especially notable findings or recommendations that should interest the client. Finally, the cover letter invites the client to contact the agency with questions or concerns and provides contact names, phone numbers, fax numbers, and e-mail addresses as appropriate. It is constructed using the writing conventions of formal business style.

The plan includes customary introductory material, such as a title page that includes the client's name, the agency or department's name, the date, and a title identifying the purpose of the report. Giving the client's name more prominence than the agency on the title page conveys a more

TABLE 16.1
Elements of the Campaign Plan, Program Proposal, or Research Report

Title page (Include client's name, agency or department name, date, and report title)

Cover letter

Table of contents

List of tables and figures

I. Executive Summary

- Purpose of report or proposal
- Overview of method and results
- Overview of conclusions (recommendations) (about a sentence or two for each)
length: 1 to 2 pages

II. Research needs

- Problem statement
- Situation analysis
 - the issue (problem statement)
 - what was known about the client and the issue
 - history
 - reporting lines for budget and policies
 - internal and external opportunities and challenges
 - assumptions (things we thought we knew but had not verified)
 - information needs (questions)
length: ranges considerably, often 4 to 8 pages

III. Research goals (What were you trying to find out?)

- Formal statements of research goals
- Further explanation of each goal, as needed length: usually 1 page or less

IV. Research objectives (How you found out, and by when)

- Formal statements of objectives
length: usually 1 page or less

V. Research hypotheses (hunches or evidence-based expectations)

- Anticipated answers to questions
- Reasoning for answer anticipated
length: usually 1 to 2 pages

VI. Research strategies

- Explanation of methodology, sampling approach
 - reasons for choices based on time, budget expertise, and need for precision
 - advantages and limitations of each choice against alternatives
- Operationalization of concepts (how ideas were measured)
 - wording of questions
 - relevance of questions to hypotheses
- Procedures for data analysis
length: usually 2 to 4 pages

VII. Results

- Discussed as answers to research questions or hypotheses
- Includes tests of assumptions
- Includes surprises
- Includes explanatory tables and figures as necessary
- Can integrate findings from different methods or discuss sequentially
length: usually several pages, plus illustrative material

VIII. Implications of the results (revised situation analysis)

- Overview of strategic recommendations with supporting evidence
- Identification of (*Only for campaign or program proposals; not included in research reports*)

(Continued)

TABLE 16.1 (Continued)

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- target publics
 - media/communication vehicles
 - messages/themes
 - evaluation strategies
 - length varies: parts may be in outline form with annotations for supporting evidence
- IX. Proposed communication plan (*only for campaign or program proposals; not included in research reports*)
- Goals
 - Objectives
 - Strategies
 - Tactics
 - Calendar (time line)
 - Budget
 - length varies; may be in outline form
- X. Conclusion
- Summary of
 - original situation analysis and problem statement
 - revised situation analysis
 - recommended strategy
 - anticipated results
 - implications for a longer-term view
- XI. References (as needed)
- XII. Appendixes
- Research instruments
 - Raw results
 - Sample campaign materials (*only for campaign or program proposals; not included in research reports*)
 - Other relevant background materials
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service-oriented impression, consistent with social marketing’s focus on the target audience. Emphasizing the agency or department producing the report can seem arrogant. Clients gain a first impression of the strategic planning team based on these details.

The introductory material also includes a detailed table of contents, along with separate lists of tables and figures so that clients can find material of special interest quickly. The team lists items included in appendixes individually so that the readers know what they will find there and in what order. Appendixes, however, often do not have page numbers. Instead, each piece receives a different heading, or slip-sheet divider, noting whether it is Appendix A, Appendix B, or Appendix C along with a title that identifies the content more specifically, such as “community survey questionnaire.” Some stylistic guidelines call for the table of contents and illustrative material to appear before the executive summary, whereas others call for them to appear after the executive summary.

EXECUTIVE SUMMARY

The executive summary addresses the needs of busy clients and executives who want to learn critical information at a glance. They may never have

the motivation or opportunity to read a report all the way through. Indeed, committees evaluating a series of proposals may look first for reasons to weed out proposals as inappropriate, unresponsive, or impractical. As a result, managers must make a strong case for a credible proposal in just a few words.

The executive summary therefore usually acts as a special form of abstract. The executive summary serves as the business parallel to scientific papers that often have abstracts of 75 to 125 words to synopsise complicated procedures and findings. Companies have different customs for executive summaries; some organizations use the executive summary more as an overview chapter than as a true abstract. Such executive summaries can go on for 10 to 25 pages. Once an executive summary goes beyond 2 pages, however, it is considered a summary chapter and not an abstract. Obviously, nobody can read it at a glance. In this case, an additional 1- or 2-page abstract may be helpful.

The purpose of the executive summary is to present the purpose of the report or proposal, the procedures used to evaluate and address the needs presented by the situation, the findings of the research performed, the conclusions drawn from the research, and an overview of specific recommendations for action. A concise executive summary outlines every crucial section of the report or proposal, giving one or two sentences to each section. Some especially helpful summaries include page numbers directing readers to the sections of the proposal that contain the details.

SITUATION ANALYSIS AND RESEARCH NEEDS

The situation analysis demonstrates the agency's understanding of the issue and situation under consideration. In some cases, this section presents research findings, but in other cases, this section provides an overview of how a situation appeared before research was performed. If an agency has performed research, this provides an opportunity to highlight the purpose of the research so that clients can understand why it was necessary.

The section opens with a statement of the problem, just like the lead to a news story. It then summarizes everything known about the client and the issue. This includes the client's mission, history, personnel and decision-making structure, locations, facilities, and other projects. It also includes a history of the issue itself, such as whether it is an international problem of concern to many organizations or a problem only for the client. The description of the issue describes the extent to which the issue is emerging, declining, stable, or cyclical. As explained in chapter 2, the situation analysis provides a detailed explanation of the opportunities and challenges that exist within the organization and its environment. It also identifies what additional information is required to design a successful campaign. Agencies and organizations often have their own preferred format for presenting this information, such as using the SWOC/SWOT (strengths,

weaknesses, opportunities, challenges, or threats) analysis. Whether presented in narrative, outline, or tabular form, background on the situation is an essential element for campaign planning. This section usually ranges from about 4 to 8 pages.

RESEARCH GOALS

The campaign proposal then turns to the presentation of research goals. If it is a proposal to perform research preparatory to the development of a campaign, this section must explain the purpose of the research. If preparing the reader for the results of completed research, it can be written in the past tense. Although this section presents research goals in a formal style, the purpose of the goal statements is to explain what the agency or department was (or will be) trying to find out. Some explanation of the goals can be provided, but this section usually requires only 1 page or less, most often in an outline form.

RESEARCH OBJECTIVES

The research objectives are presented in formal objective style in an outline. These objectives state what research was (or will be) performed in response to the research goals. The goals and objectives can be presented in one interwoven section instead of two separate sections if doing so makes the purpose of the research more clear. This section usually requires only 1 page.

RESEARCH HYPOTHESES

Although communication managers do not need to act like academic scientists, they still can present informed hunches to clients. These hunches guide both data collection and data analysis. In response to the questions that need answers (the research goals), this section provides insight into what answers the manager may expect to find, along with the reasons for these expectations. If a manager expects to present surprising or discomfiting results to the client, this section can help prepare the client by presenting possible results scenarios. This section usually requires 1 or 2 pages.

RESEARCH STRATEGIES

All research requires a thorough explanation of the methods used to collect data. For quantitative research, refer to the Standards for Minimal Disclosure of Opinion Polls (American Association for Opinion Research, 2004) (see Sidebar 12.1); further details are available in Appendixes A and B. Because every research project suffers from limitations of some sort, the

client needs to understand what guided your decision making as you performed the research. For example, if you present a mail survey, the client may want to know why a telephone or Internet survey would not have been a better choice. If you surveyed residents of one town when the client operates in seven towns, the client will wonder why only one town was used.

This section discusses the specifics of methodology, along with the reasons for making choices of method, sample, question design, and procedure. Steps made to ensure quality control throughout data collection also are included. The wording of all questions used in surveys, focus groups, and formal interviews are described, although long data-collection instruments can be described briefly using examples, and complete details can be provided in the appendixes. This section also includes a discussion of the limitations of the research performed, as well as a defense of its usefulness given its limitations. For example, a telephone survey of individuals who have declined to donate to an organization during previous fund-raising campaigns could ask what might prevent a respondent from donating to an organization like the client's, instead of asking what has prevented the respondent from giving in the past. The disadvantage of such a strategy is that the question is less direct, but the advantage is that respondents may give a more honest, less defensive answer if they do not feel singled out for having refused to donate previously. This section includes information about response rates, refusal rates, and data analysis procedures, explained in chapter 12. This usually requires about 2 to 4 pages, depending on the scope of the project.

RESULTS (WITH MINIMAL INTERPRETATION)

This section presents a straightforward recitation of the research findings, putting each finding into the context of the research goals and hypotheses. It helps to restate each research goal and hypothesis before providing the results. This allows a client to read the results section independent of the rest of the document. Providing context ensures that the results will make sense to the reader; managers should never simply list results. Consider that the client will read this section to find out what questions have answers, what assumptions have support, and what surprises have emerged. Research for a client with an apparent credibility problem, for example, may reveal that the client suffers from a lack of awareness rather than a lack of trust.

It helps to provide tables and figures to highlight particularly important findings. Too many tables and figures, however, overwhelm the reader and reduce their impact. A judicious selection of tables and figures is integrated into the text instead of being relegated to the appendixes because most clients do not have the time, motivation, or inclination to flip back and

forth between the two sections. The length of this section depends on the scope of the research and the complexity of the findings.

When reporting several research projects, such as a survey and a series of focus groups, the manager must decide whether the information will have the greatest effect presented as discrete sections (e.g., Survey, Focus Group 1, Focus Group 2, Focus Group 3) or in a consolidated discussion format organized in terms of research questions and hypotheses. Often, the consolidated format works well. For example, a survey finding on low credibility can be supplemented by focus group responses, which should take the form of themes illustrated by specific quotes, describing impressions of the client's recent communication activities.

REVISED SITUATION ANALYSIS

This section discusses the implications of the research results. After the research has been performed, the communication manager will have a more definite view of the reasons for a problem experienced by the client, along with directions to guide strategy development. This section summarizes the results, indicating how they change or confirm the original view of the situation. The section goes on to provide an overview of recommendations for a public relations program or communication campaign. Each recommendation must seem appropriate and realistic. To convince the client, each recommendation is accompanied by reasons that describe why it is appropriate; why it will be effective; and why it is worth the cost, in time and money, of implementation. Supporting evidence can take the form of findings from the research, public relations principles, and communication theory. Clients expect concrete reasons for action rather than esoteric discussions of theory, however, so keep it simple.

Coming after the summary of the situation and recommendations, this section presents a clear breakdown of the elements for the communication program. These include a discussion of appropriate target publics, communication channels, recommended messages and themes, and methods to evaluate program success. This section can be presented in outline form, provided each recommendation is explained and defended in a companion section. The length varies depending on the scope of the campaign.

PROPOSED COMMUNICATION PLAN

This section, frequently presented in outline format, presents the complete communication program plan. This includes goals, objectives, strategies, tactics, a calendar for implementation and completion, and a proposed budget. Some managers prefer to present all of the goals, followed by the objectives, followed by strategies and tactics. Others integrate all of the

components needed to achieve each goal with that particular goal, like a series of strategic planning ladders (see chapter 3) presenting strategies and tactics specific to each objective along with the objective itself.

CONCLUSION

A brief conclusion provides a summary of the problem, the discoveries, and the solutions. The conclusion can put the project into a larger context, showing how achieving the goals of this program will contribute to the organization's overall mission. A long-term view will demonstrate that the communication manager has a deep understanding of the client's needs and challenges, which can help build credibility both for the project proposed and for the long term. The conclusion should remain brief, rarely stretching beyond 1 or 2 pages.

REFERENCES AND APPENDIXES

Some communication plans include references, but managers must determine the extent to which clients will appreciate background material as opposed to finding it distracting or, even worse, self-important. Appendixes, however, usually are essential. The appendixes include copies of all research instruments used, a summary of the raw results, and other illustrative sample campaign materials such as brochures.

THE SUCCESSFUL WRITER'S MIND-SET

One of the most important skills a manager can possess is the cultivation of a confident demeanor, both on paper and in person. Managers sell themselves short by appearing hesitant, because hesitance will appear to come from self-doubt. Confidence comes across well when combined with a respectful attitude, but managers must avoid seeming arrogant. In writing, hesitance reveals itself through use of the first person to advance ideas. Using phrases such as "I believe" and "we recommend" signals to the reader that managers do not have evidence on which to base opinions. As a result, written reports and proposals need to avoid using "I" and "we," which appear to advance tentative opinions instead of authoritative facts. A better strategy has the writer using the third person to state ideas directly and plainly, remembering to back up every idea with evidence, such as public relations principles and theory, and data from research, a source, or experts. Assertions have much more credibility when the manager can demonstrate their veracity with facts and sources, instead of "believing" or "feeling" them to be true.

Reports and proposals also must avoid passive voice, which gives the appearance of hesitance or, worse, evasiveness. Passive voice makes it seem as if an action is being done to another thing by something, instead of something doing an action to another thing. In other words, it reflects reactive writing instead of proactive writing because it emphasizes the receiver of the action instead of the initiator. Active voice and active verbs give power to communication efforts. Active voice appears authoritative.

Throughout the document, the manager must display confidence, expertise, and empathy with the client. To communicate effectively, writing must be clear, interesting, and correct. As shown in *The Effective Writer's Mind Set* (Austin, 1989) the writer must ask the following questions:

1. *What do I want to get across?* Know your main communication objective. The opening argument or lead forms the foundation for a communication piece. A strong lead helps the rest of a piece fall into place and shows readers why they should continue to read. A good lead uses direct sentence construction and addresses who, what, where, when, how, and why. A main argument for a report or speech shows a commitment to the subject through a clear, strong position statement. A strong opening argument statement will inspire and focus your writing and will inspire the reader as well.

2. *Can I visualize my audience?* Writing must target an audience. Try to imagine the audience and its expectations. Show an awareness of its interests and level of expertise. Show respect for audience members: Assume they are intelligent. But do not assume they know what you are talking about: Spell everything out using simple language. Tell them only what they care to know. If you want them to know something, make sure you show them why they should want to know it (i.e., demonstrate its relevance to them).

3. *Is my main point obvious?* Get to the point quickly. You do not have room or time to get wordy. Busy readers will not bother to wade through extra verbiage. Use active voice (not passive voice that relies on words such as "is," "was," and "to be"), look out for lots of little words such as "then," "in," "to," "so," "as," and so on because they often signal clutter, and worry more about providing supporting statements for your arguments than about adding embellishments and description.

4. *Am I vague?* Get specific. Without sufficient support, even the best ideas remain generalizations. At worst, the reader will think the communicator is trying to hide something. Try to develop main ideas to their fullest extent; explore the areas of a subject in relevant detail. Do not just tell; instead, show, by using evidence and examples. Remember that you need to convince the reader with your argument, so avoid merely describing your position.

5. *Am I logical?* Make strong transitions. Written ideas need to progress in a continuous, logical manner. Readers must see easily how every new bit of information relates to what came before it. Do not assume any relationships are obvious; you have to make these connections obvious for the reader as you write. Present new news before old news.

6. *Do I provide enough (too much) explanation?* Use supporting evidence effectively. Use only what you need: the perfect example, the exemplary quotation, the clinching statistic. When using quotes, remember to introduce the quote and explain its significance or implications (i.e., what it shows or proves). Do not just drop it in. Readers need to know why you want them to read a quote.

7. *Am I interesting?* Vary sentence structure. Variety comes naturally in our thoughts and spoken words, thus variety in your writing will read more naturally and will seem more interesting. How do you do it? Vary short and long sentences. Try mixing the order of subordinate clauses or subject and verb. Read your writing aloud to hear how it sounds. But avoid a lot of complexity, particularly in news items that generally have few embellishments.

8. *Does my writing read naturally?* Write as you would speak, but avoid conversational expressions. Good writing read aloud sounds like good conversation. In conversation, however, we use shortcuts and embellishments that appear sloppy in print. Avoid meaningless qualifiers such as “really,” “very,” “pretty,” “so,” “sort of,” and “kind of.” Also avoid colloquialisms and clichés. If you have original thoughts, they deserve original words to describe them. Make sure you follow the appropriate style guidelines for your piece: Associated Press style for news releases, newsletters, and newspapers; Chicago style for magazine articles; American Psychological Association style for scientific documents, and so on.

9. *Is my writing free of errors?* Eliminate mechanical and grammatical errors. Always proofread. No matter how good your ideas, no one will take them seriously if your writing includes basic errors. If in doubt of spelling or grammar, look it up or ask a colleague. Always proofread at least once just for grammar and spelling errors.

10. *What impression do I leave at the end?* Write a strong conclusion. In report, feature, proposal, and speech writing, your conclusion makes as strong an impact as your introduction. Here you sum up your evidence and show how it all inevitably validates your main argument. This also provides you with the opportunity to take the reader to the next step. You can expand on the topic, suggest where all this may lead, or show how it all contributes to an overarching mission.

11. *Am I my worst critic?* Revise and rewrite. Become your toughest critic. Do not fear multiple rewrites. Good writing appears deceptively easy, just like good gymnastics. It takes a lot of practice and wrong moves to get it right. Do not be discouraged!

ORAL PRESENTATIONS

Presentations themselves require research. Presentations differ depending on the size of the room and the number of people attending a presentation, for example. It helps to know as much about the audience as possible to understand their interests, their needs, and their expectations of formality. It also helps to know their competition and your own competition to put recommendations into a context that will maximize the presenters' credibility. Familiarity with room lighting and seating arrangements helps presenters construct a presentation with the appropriate degree of formality or intimacy.

Always be ready to adapt because timing, room locations, and other characteristics of the presentation situation may change on a moment's notice. If you plan to use PowerPoint or other technology, have backup plans in case equipment breaks or the power goes out. In one case, presenters to a regional public relations breakfast meeting brought two computers, each with the presentation on the hard drive, as well as a CD-ROM in case someone else's equipment had to be used. When the interfaces to the projector worked with none of the equipment, including a third computer supplied by the event planners, no technicians were on duty yet to help out. Fortunately, the presenters had brought overhead transparencies and handouts.

Oral presentations often take the form of a 10- to 15-minute pitch, after which clients ask questions. The sale of a project ultimately depends on the quality of its presentation, including the ability of the presenters to deal with unexpected situations and challenging questions. Effective presentations require substance more than bells and whistles, but some sizzle helps demonstrate professionalism and creativity. A successful pitch depends on effective organization, clarity, and completeness; clear illustration of key points; and a professional demeanor.

1. *Organization of ideas.* As with a written document, clients appreciate it if managers present ideas in a logical order. Clients who become confused will blame the communicator rather than themselves. They will look for another agency that makes more sense. In other words, if the presentation loses the client, the agency loses the job.

2. *Clarity and completeness of presentation.* Ideas need to seem concrete, efficient, and effective. They must build on each other to create a cohesive plan, without redundancy. A brief presentation can never present every detail of a proposal; careful choices must be made. The client needs to know he or she has heard the key ideas, recommendations, and evidence. The manager's challenge is to demonstrate a deep understanding of the client that enables the agency or department to anticipate the client's priorities, concerns, and reservations about the project. The client should not have any nagging questions or doubts following the presentation. It helps to practice

answering tough questions to anticipate dealing with reservations a client may have.

3. *Illustration of key points.* Presenters need visual aids to illustrate key points and to add interest to a presentation. Illustrations also can help relieve the presenter's nerves by providing clients with a focus other than the presenter. Illustrations such as outlines of key points can pull a presentation back on track if a presenter forgets the script or becomes distracted by questions or disturbances. Visual aids must serve an explanatory purpose, instead of seeming pointless. Pointless illustrations risk leading clients to believe agencies will recommend pointless program tactics as well. Because illustrations represent the presenters in a prominent way, they must be neat and free of errors. Charts and tables require large type and few words to be readable and easy to interpret. Give the audience at least 3 to 5 seconds to digest even the simplest visual aid. Clients often expect computer-aided presentations, but they aid a presentation only if they make sense. Keep in mind that equipment frequently malfunctions, and have a "low-tech" backup plan for any "high tech" presentation.

4. *Presentation style.* Presenters need to look and act professional, which requires rehearsal. Most clients expect presenters to dress in business attire, but some agencies have success with a more avant garde approach that distinguishes them from the norm. This is a risky strategy, however, and can communicate sloppiness or arrogance if it backfires. To demonstrate confidence and empathy, presenters need to make eye contact with audience members. The presentation of bad news requires a gentle demeanor, and in some situations eye contact can seem overly aggressive: Avoid making clients feel defensive. To soften bad news, open with a bit of good news and then present bad news without assigning blame and in a way that gives the client realistic hope that problems can be resolved. Presenters need to show enthusiasm for and confidence in their material. If something goes wrong during the presentation, the client probably will not worry about it if the presenters show good humor and continued confidence in their material.

FINAL THOUGHTS

The communication plan serves as the manager's sales pitch. The manager demonstrating expertise at promoting an organization's mission must illustrate this expertise in the promotion of the communication department or agency itself. Each public relations pitch constitutes a communication campaign in miniature. The manager wants to appear confident, credible, enthusiastic, and creative, but never hesitant, insincere, uninterested, or arrogant. Public relations and communication principles apply just as much to plan writing and presentation as to programming itself.