



THE UNIVERSAL ACCREDITATION BOARD ACCREDITATION STUDY COURSE

PLANNING

Session **6**

Overview

This session of the Accreditation Study Course is designed to give the participants an overview of Planning Terminology and experience in organizing the function of public relations and gaining acceptance for a professional approach.

► **Reading to be assigned BEFORE this session**

- Basing a public relations program on the institution's objectives
- Defining public relations goals and objectives
- Program strategies and tactics
- Detailed List of Knowledge, Skills and Abilities tested, Candidate's Preparation Guide for the Examination for Accreditation in Public Relations Segments 2.2, 2.3, 2.6, 2.7, 5.8, 5.9, 5.10, 6.4, 6.9 and Specific Areas of Competence in Readiness Review.

Special Note for Coach

If you have not been coaching recently, please review these preliminary materials: For You, the Coach; The Coaching Method; Managing the Class; About House Rules. Before the day of the class, make sure you are familiar with the content in the reading which candidates should have done, and with the exercises you are going to conduct in this session. Consider any adjustments you may need to make if this is a free-standing unit, or is part of a sequence of preparation classes.

► **Significance of Subject Matter**

- Material presented in this session relates to two sections of the knowledge, skills and abilities to be tested in the APR Examination, which together are weighted at 40 percent.

► **Handouts for this session**

- Lee King Pipe Systems case study – Handout #23
 - How to Organize the Public Relations Function – Handout #24
 - Components of a Public Relations Plan or Communication Plan – Handout #25
 - Calisthenics #6 Strategy – Handout #26
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- ▶ **Visual Aids needed for this session**
 - Mission, goal, objectives -- Visual #10 a,b,c
 - Audiences – Visual #11 Five quick pages
 - Objectives – Visual #12 Awareness, attitude, action
 - Objectives – Visual #13 Audience, outcome, attainment, time frame
 - Strategy – Visual #14
 - Tactics/tools – Visual #15
 - A Graphic Presentation of the Four-Step Process – Visual #8
- ▶ **Exercises conducted during this session**
 - Lee King Pipe Systems case problem
- ▶ **New lecture material to be delivered during this session**
 - Planning Terminology

I. Agenda for Session

Instructions: Review

2 minutes

- ▶ Planning terminology
- ▶ Work on a case problem

II. Planning Terminology

Instructions: Presentation by coach

40 minutes

- ▶ **Comment:** It's time to give some serious thought to the planning structure in public relations, and the way you will use it in the Readiness Review and the multiple-choice Examination.
- ▶ Confusion of terms: If you have worked with Strategic Planning or Management by Objectives (MBO) or some other system for organizing the planning process in your own organizations, you probably have encountered different understandings of the terms “goal,” “objective” and “strategy.” A considerable confusion of terms exists in the field.
- ▶ Working structure: The Universal Accreditation Board – and many other authorities in our profession – believe that goals should be broad targets, objectives should be specific, and strategies should indicate how you are going to proceed to carry out your objectives and reach your goal. This is the general structure within which you will need to be able to work, to prepare for the Readiness Review and confront the later multiple-choice Examination. I think you will find it useful thereafter, also, although you may need to be able to shift gears upon occasion and work in a different framework. As an aside, in presenting a plan to supervisors or to a client, it is a good idea to write a brief note, immediately preceding the statement of goals, stating the meaning of the terms in your context. A further aside: Textbook authors set up individual interpretations on planning vocabulary. Don't get tangled up in the differences. Learn – and use – the structure we will work in today.

- ▶ If your organization or client has a mission statement, of course you start with that. Everything in any plan you develop should be consistent with the stated mission.

*Visual #10a Mission/Goal
Follow immediately with #10b Goal*

Let's go at the terms one at a time . . .

- ▶ **Goals:** Writers sometimes use the terms “goals” and “objectives” interchangeably, but usually goals are more global. They indicate the ultimate outcome the program is designed to achieve (Broom and Dozier, cited by Stacks¹). Goals are the result you desire.
 - > There are differences of opinion about whether goals should be measurable. Broom and Dozier² say Yes, both goals and objectives should specify measurable results. The Cutlip and Center³ text gives, as an example, a goal with very specific outcomes. The Stacks text⁴ quotes Walter Lindenmann, that measurement is difficult unless applied to specific activities.
 - > Other authorities say a goal should be “a statement of being” such as “to be the pre-eminent firm” in a field . . . “to be the recognized leader” or “to be recognized as a leader.”
 - > An “end result” goal could also be something like “broad and continuing public support” for your organization or a concept, or “widespread understanding of the value of . . .” a concept you are fostering.
 - > In the UAB concept, measurement is built into objectives, not goals.

Visual #10c: Objectives

- ▶ **Objectives** get down to specifics. Objectives relate directly to one or more audiences or publics.

*Visual #11, Audiences (if desired)
Five quick pages*

- > Let's talk for a moment about those audiences or publics. Another good term for them is constituents. They are the people who are served by, represented by, or involved in your organization. When you start thinking about a problem, a crisis or an opportunity, you first ask yourself:
 1. Who will be affected?
 2. Who needs to know or understand?
 3. Whose advice or support do we need?
 4. Who needs to be involved?
- > Answering those four questions will produce the list of audiences, or publics, or constituents you need to consider in your planning.
- ▶ Now back to objectives for those folks. Objectives define what behavior, attitude or opinion you want from them, how much you hope to achieve and when.

*Visual #12 Objectives
Attitude, awareness, action*

- ▶ Notice that there is a difference – a big difference – between **process objectives** and **outcome objectives**. Process objectives may be familiar to you. Some forms of planning are likely to specify process – so many releases, so many contacts, so many other activities. Sometimes objectives speak of “informing” or “educating” a public. Most authorities in public relations now emphasize that objectives should aim at behavior or the mental conditions that underlie behavior. Sometimes this is expressed as objectives for awareness, attitude or action. Always, it is a result, not the process by which you achieve that result. The process comes elsewhere in your plan. One writer makes the distinction between “**output**” objectives and “**impact**” or “**outcome**” objectives. *We are looking for impact objectives.* Always, a measurable end result. Behavior is the easiest to measure, but awareness, opinion change or maintenance of support can be assessed by formal or informal means.
 - > **A word of caution:** Common sense tells you not to aim for 100% of anything in your objectives. MBO stresses that objectives should be attainable. Look at what is reasonable in light of your situation and your time frame.
 - If you have benchmarks, you may be able to target specific numbers on a scale, such as days of absenteeism, literacy rates, number of grievances, number of graduates. Without a precise benchmark, you can seek a percent of increase or reduction – 20% above or below the existing level, or 50% or 60% if that is attainable in the situation. This is, of course, based on the premise that you know the existing level.

*Visual #13 Objectives
Four elements*

- ▶ When you find yourself writing objectives – as you will, in practice and for the Readiness Review – analyze them by the four points in the operational definition:
 - Public or publics; audience or audiences or segments thereof
 - End result from those publics or audiences
 - Level of accomplishment
 - Time frame
 - > *If you don't have all four, think some more!*
 - > It will probably occur to you that if you specify a level of accomplishment, you have to have some way of measuring that level. That can be built into the objective, or it can be stated in the evaluation portion of your plan. Often you will find yourself coming back to the objective to see how it can be measured, and possibly editing or refining your objective at that time to make it all work together.

Visual #14: Strategy

- ▶ **Strategies** describe *How* you will try to reach your objectives. Your objectives have set down the *Who*, *What* and *When* of your plan. Strategies tell *How* you will attempt to do this to best advantage, with the most efficiency and least cost, drawing on what you know about psychology, society, and communication.

- ▶ Here is where you say you will make use of community influentials, informal leaders, unions, tie-ins, other people's advertising space, personal visits, collaboration with business or professional associations, churches, service clubs, demonstrations, native-language newspapers, multiple media – whatever you see as your best means of reaching your audiences and eliciting the end result you seek.
 - > Observation: Strategies have a way of sneaking into your objectives. Some planning methods require you to say, in your objectives, how you are going to accomplish your result. Watch out for this aspect. Examine your objectives, and see that they contain the four desired characteristics, but separate the “how” into a strategy.

Visual #15: Tactics/Tools

- ▶ **Tactics, tools, activities:** These probably will come to you easily. They are what most of us think of first. Our intuition jumps to that stage. In terms of structure, tactics are subdivisions of strategies. Tools are a synonym for tactics. They are the **more specific “how”** items, ways to accomplish your objectives and work toward your goals. Meetings, publications, tie-ins, community news media, Web sites, conferences with executives or leaders, direct mail, events, – that kind of item. **Activities** are the finer details of the operation. Six conferences, two flights of direct mail, tie-in with three nonprofit campaigns – with dates and who is in charge. When you have done your thinking about objectives and strategies, the tactics and activities usually fall into place, for people of your experience. It's jumping to the tactics and activities without the prior thinking that gets you into trouble.
- ▶ **Summing up:** Try to salt this away in your mind, embed it in your notes, let it incubate, come back to it from time to time so you have it well in mind. This understanding of the various aspects of the planning process is something you ought to be able to use every day, without having to look it up. Start practicing it, in your daily work, even if it is only in your thinking about your daily work. Be ready to use it in any case studies you tackle in later sessions. Unless you have a vastly better system, expect to apply this system in what you prepare for the Readiness Review.

Elapsed: 45 minutes

III. Organizing the Function

Instructions: Coach presents information

Allow 70 minutes for unit

- ▶ Now let's think about how all this might come into play in a real-life situation.
 - > We will use a case problem about a manufacturer, Lee King Pipe Systems.
 - > **Hand out** the Lee King Pipe Systems case, Handout #23.
[Text of the handout follows, FYI]

[Handout text begins here]

Lee King Pipe Systems

Lee King Pipe Systems, Inc., a member of the American Stock Exchange, has just hired you as its Director of Public Relations. Lee King Pipe Systems produces an extensive line of flow-control systems and valves for liquids and gases used in manufacturing applications, refineries, plastics and the like. The selling points of the company's product are quality, long life, and freedom from failures/breakdowns. The company has no consumer "proprietary" products and virtually no R&D activities.

Your predecessor was not very effective or energetic and only produced an occasional release, entertained visiting customers, and, when pushed, wrote a speech. Traditionally, Lee King Pipe Systems has not been concerned with its communication, but now they see a need for higher visibility and fence mending with publics.

You are viewed as a real public relations professional and are being paid twice your predecessor's salary to develop a full public relations program. However, you recognize that few, if any, people in the company even know what a "full public relations plan" includes.

The President, to whom you report, has given you a month to settle in before you make your recommendations on a plan of action for a comprehensive public relations program.

Your Questions:

- a. Briefly outline the things you would do both within and outside the company to get a handle on the company's status.
- b. Recognizing that you may have to educate people in the company about what a comprehensive public relations plan includes:
 - (1) Identify each part of such a plan; and
 - (2) Give a brief example of what you might present in each part of your plan.
- c. Describe a strategy for justifying or gaining approval of your public relations plan within the company.

[Handout text ends here]

- **Continue:** Take three or four minutes, whatever you need, to read the problem and the questions you are expected to answer. We will work our way through it one item at a time.

- > **Ask:** Any questions about the assignment?
- > **Ask** class to start with question A. *Allow 15 minutes*
- > **Take** five minutes to make notes.
- > **Call** for responses in the customary fashion: Who will give me one thing
(See "The Coaching Method" section in the introduction.)
- > **Inquire** how they "outlined" the things they would do. It should have at least two parts – inside and outside the company.

> **Observe:** This case problem was part of the Study Guide for the previous written examination. Here are the items the Answer Key said should be in your answer to this portion:

▶ ***Within the Company:***

- a. Review all historical and current literature about the company.
- b. Personally interview top key executives.
- c. Interview key representatives of the sales force, clerical staff and (if appropriate) union representatives.
- d. Acquaint yourself with the manufacturing process from receipt of raw materials to the sale and distribution of the products.
- e. Interview compliance person (perhaps Human Resources Department person) to see if the company is in compliance with government regulations (EPA, OSHA).
- f. Check for crisis plan.

▶ ***Outside the Company:***

- a. Analyze content of past clippings on the company, the competition and the field in general (use data retrieval system or service).
- b. Conduct telephone survey of stockholders, brokers, key suppliers, media people, key customers, financial analysts, and legislators.
- c. Hold one-on-one meetings with individuals in the above categories.
- d. Check memberships of the company in trade and business associations and determine the extent of participation.
- e. Consider “corporate citizenship” activities of the company, pro-bono activities, charitable contributions, employee-community service programs, etc.

▶ **Take up question B.**

Allow 25-30 minutes

> Give class 10 minutes to make notes.

NOTE TO COACH: Do not, at this moment, reiterate the thrust of the question, which is to identify and illustrate components of a plan. We'll see, later, if they caught that.

> **Call** for responses as usual, “one thing” which should be one element of a plan [research, goal, audiences, objectives, strategies, tactics, time table, budget, evaluation].

- During the response process, check to see if they give you:
 - ◆ a part of a plan with one brief example
 - ◆ only a segment of a plan or only an illustration

> *This is a check for paying attention. They should have given you a two-part response. This is the kind of question that could come up during a Readiness Review interview.*

> **Offer**, for comparison, these illustrations from the Answer Key in the one-time study guide: [Observe that they are only illustrations, not a catalog of all correct answers.]

<i>Parts of Plan</i>	<i>Examples of Parts</i>
Research	Situational analysis, internal communication audit, survey data of target publics.
Statement of Goals	To enhance the reputation and recognition of the company with its publics.
Objectives (short/long) Addressing desired result in terms of opinion change or behavioral outcome for each public within a specified time frame and level of outcome.	Within six months, 40% of trade press editors, when surveyed, will recognize Lee King as the manufacturer of quality valves and flow control systems. Within 18 months, three customer representatives will voluntarily write testimonials about Lee King's superior products.
Outline Strategies	Improve relationships with the media through continual contact.
Tools/Activities	Develop a media data bank, meet with at least one media person per week on a one-on-one meeting.
Time Table	Specific time frames for activities.
Budget	Specific dollars connected to specific activity costs.
Evaluation	Relate to objective being evaluated for each public and identify method and source of data.

- **Go to question C.** Describe a strategy for justifying or gaining approval of your public relations plan within the company.

Allow 15 minutes

- > **Allow** two minutes to make notes.
- > **Call** for responses as usual.
- > **Check** responses against the answer key, which is creative.

- ▶ **Here are the ideas in the old Answer Key**
 - > Present the rationale for public relations efforts in an interesting way, perhaps using charts or other graphics.
 - > As each part of the plan is written, check with the person who will be specifically involved and get that person's input and approval prior to general presentation. **BUILD YOUR CONSTITUENCY SUPPORT AS YOU GO ALONG.**
 - > Make a videotape of key executives talking about ideas in the plan to use in presentation of the plan to the larger executive group.
 - > Establish an employee advisory council and/or management advisory council to monitor degree of opinion change.

- ▶ **Recognize other creative approaches arising in the class.**
 - > *Ask:* How does it work at your place?

- ▶ **Discussion led by coach:** *Allow 10 minutes*
 - > *Ask* class to share organization structures of departments/companies where they have worked, or with which they are acquainted.
 - Centralized, decentralized
 - Service centers, profit centers
 - ◆ Does anyone bill internal clients?
 - Integrated marketing?
 - Line and staff functions
 - Internal departments, outsourcing functions
 - Coach may contribute other kinds of organization from experience or background knowledge.
 - > *Discuss* advantages, disadvantages.
 - Sharing experience here usually is extremely insightful.

- ▶ **A Resource**
 - > *Observe:* In the course of your professional life, you may be called upon to recognize where the various functions of public relations actually are performed in an organization, and perhaps to recommend where and how they might be better performed. Here is a paper which could help you think this through. It may also be a good resource for your written submission for Readiness Review, where you are asked to describe and discuss organizational structure. Earlier drafts of this paper have been circulating in professional circles for 25 years, with regular revisions. The author, Jim Haynes APR, Fellow PRSA, was appointed to the Universal Accreditation Board in 2003, and updated the piece for our use in accreditation study.

Give class Handout #24, How to Organize the Public Relations Function.

IV. Organization of Public Relations Plan

Instructions: Presentation by coach.

Allow 10 minutes

- ▶ Review the four-step process, very briefly.
 - > *Use* visual, four-step process.

Visual #8 Four-step process

- > **Introduce** 10-step process for campaign.⁵
Give class handout #25, Components of a Public Relations Plan or Communications Plan
- > **Note** that it begins after research has been done.
- > **Comment:** The whole “Components” document fits on Step 2 of the diagram. It is all planning. The evaluation item is your plan for how you will evaluate your work later, when you get to the last question mark on the diagram.
- > Any campaign should include these steps, or you should know why you omitted some of them, such as:
 - You were not required to budget.
 - A timeline was not expected.
 - Budget and details are delegated to field units.
 - Whatever other factors prevailed.

V. Follow-Up Assignment: Mental Calisthenics

Here is a mental exercise to help you get your brain in shape for the APR Examination. If you have been doing calisthenics in earlier sessions this one follows, but you can begin here. Do make time for this. It is an essential workout for your mental muscles.

Give class handout #26, Calisthenics #6, Strategies.

Elapsed time: 2:00-2:15

References

- 1 *Primer of Public Relations Research*, Don. W. Stacks, page 26, copyright 2002 The Guilford Press, New York NY.
- 2 Glenn M. Broom, David M. Dozier, *Using Research in Public Relations*, pp 40. Copyright 1990 Prentice-Hall, Inc., Englewood Cliffs NJ 07632.
- 3 *Effective Public Relations*, Scott M. Cutlip, Allan H. Center, Glen M. Broom, p. 386, 8th edition. (Prentice-Hall, Englewood Cliffs NJ 07632 2000)
- 4 *Primer of Public Relations Research*, Don. W. Stacks, page 26, copyright 2002 The Guilford Press, New York NY.
- 5 *Components of a public relations plan or communications plan, 10 steps for a plan or campaign after the research phase*, Ferne G. Bonomi, APR, Fellow PRSA, handout for this unit.

