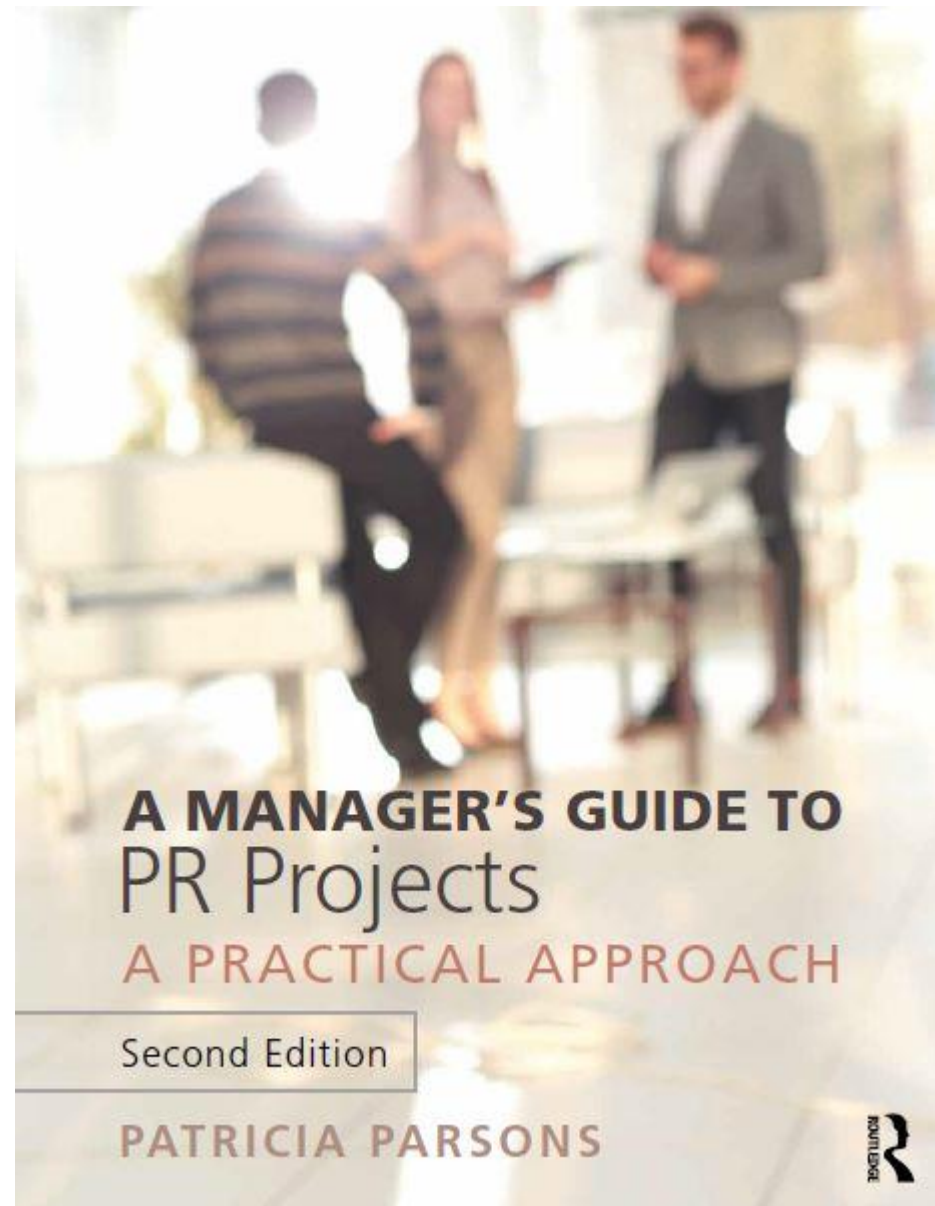


The following slide presentation is designed to accompany the workbook “*A Manager’s Guide to PR Projects: A Practical Approach*” 2<sup>nd</sup> edition

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PART 3

# THE PLANNING PHASE

## WHAT THIS SECTION COVERS...

- Fundamentals of the PR planning process
- The “publics” of public relations
- Developing objectives for the plan
- The “core” of the plan: messages, strategy and tactics



# FUNDAMENTALS OF THE PLANNING PROCESS

TYPES OF PLANS AND HOW THEY FIT TOGETHER

# EVEN THE SMALLEST ACTIVITIES INVOLVE A DEGREE OF PLANNING

Using the example of a news release...

- **Research**
  - What background information is required?
- **Planning**
  - What specific public beyond the media? Purpose?
- **Implementation**
  - How will it be distributed?
- **Evaluation**
  - What kind of follow-up is required? How will you know if it has been picked up?

# FORMAL PLANS: THE STRATEGIC PLAN

... broadly developed plans based on the overall business plan of the organization and designed to achieve broad objectives for the development of relationships with the organization's publics...

# STRATEGIC PLANNING AS A MANAGEMENT PROCESS

- Strategic planning “...sets the organization’s direction proactively, avoiding ‘drift’ and routine repetition of activities...” Broom & Dozier

## PR PLANS MUST ADAPT TO THE ORGANIZATION'S OVERALL MISSION

A MISSION is a succinct statement that includes what the organization does, for whom it does it and how it does it...



# KEY ELEMENTS OF THE PLANNING PHASE

Defining & describing publics

Determining the overall goal & the specific objectives supporting the goal

Articulating the core message and any sub-set of specific messages for specific publics

Determining overall strategy & tools & tactics to fit within the strategy

# DELIVERABLES IN THE PLANNING PHASE

## The plan framework

- The basic outline of the complete plan
- Can be used to communicate intentions to client
- Can be used to pitch a client

## The plan itself

- The thoroughly researched, comprehensive plan that communicate the details
- Written in the planning phase including all four elements: research narrative, strategy and tactics, how the plan will be implemented, how the plan will be evaluated

# WHAT IS THE DIFFERENCE BETWEEN A “STRATEGY” AND A “TACTIC”?

## The Strategy

- The overall approach
- Example: a social media strategy
- Example: a face-to-face strategy

## The Tactics

- The specific vehicles within the strategy
- Example: YouTube as part of a social media strategy
- Example: A series of town hall meetings as part of a face-to-face strategy




# CONSIDERING THE “PUBLICS” OF PUBLIC RELATIONS

## DEFINING “PUBLICS”

A PUBLIC is a group of people who share a common interest, demographic, or psychographic characteristic, *as defined by the public relations function of the organization*, and whose actions are either influenced by or have an influence on the organization.

## EXAMPLES OF TYPICAL “PUBLICS” (AS DEFINED BY PR)

- employees
- volunteers (in not-for-profits)
- members (in membership organizations)
- financial donors (usually in not-for-profits)
- investors (in publicly held corporations)
- media (traditional mass media, industry-specific media)
- social media including online communities
- community (geographic or otherwise)
- government (various levels)
- regulatory bodies



# Public, audience, stakeholder? What's the difference?



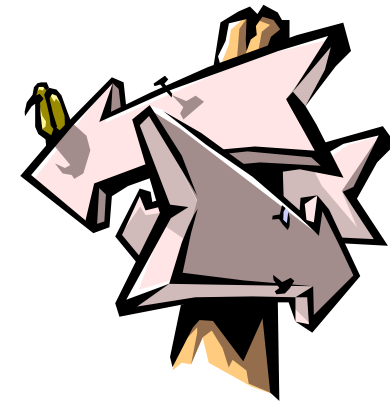
# DEVELOPING THE PLAN'S OBJECTIVES

TYPES & CHARACTERISTICS OF OBJECTIVES



# DEVELOPING PRIORITIES & OBJECTIVES

- Where are we now?
- Where do we want to go?
- How do we get there?
- How will we know when we arrive?



# OUTCOME OBJECTIVES

OUTCOME OBJECTIVES are specific statements of destination that assist in the accomplishment of the stated overall goal. They are clear, measurable, realistic, and include a time frame.

## WHAT IS WRONG WITH THE FOLLOWING OBJECTIVES?

- To improve the organization's image by 30%.
- To have three open houses annually.
- To develop a Facebook page.
- To increase membership.

## HERE'S WHAT'S WRONG!

- To improve the organization's image by 30%.
  - Not measurable, not realistic
- To have three open houses annually.
  - Describes a tactic rather than an outcome.
- To develop a Facebook page.
  - Describes a tool rather than an outcome.
- To increase membership.
  - Vague, no measurement included, no time frame

# THE IMPORTANCE OF “RELATIONSHIP” OBJECTIVES

- Public Relations exists, above all, to create and maintain mutually beneficial relationships
- A strong, positive relationship between an organization and its important publics will always support any other informational/marketing/promotional goals
- Publics who feel positively disposed to your organization will be more likely to change their behaviour in the direction of your planned objectives

# RELATIONSHIP OBJECTIVES

**Consider the following questions as you decide on how to set objectives about the quality of the relationships.**

- To what extent is it important that the public trust the organization?
- To what extent is it important that this public feel positive about this organization?
- To what extent is it important that this public believe that the organization gives as much as it takes from them?

# PROCESS OBJECTIVES

- **Process objectives** are statements that describe processes that may need to be monitored for the effective selection, development and implementation of tools & tactics.
- **Examples** (processes not outcomes)
  - To communicate regularly
  - To respond in a timely manner to online feedback.
  - To monitor our Instagram account weekly.

# HIERARCHY OF OBJECTIVES...

**Awareness/ informational**

- Cognitive

**Attitude/acceptance**

- Affective

**Action**

- Behavioural



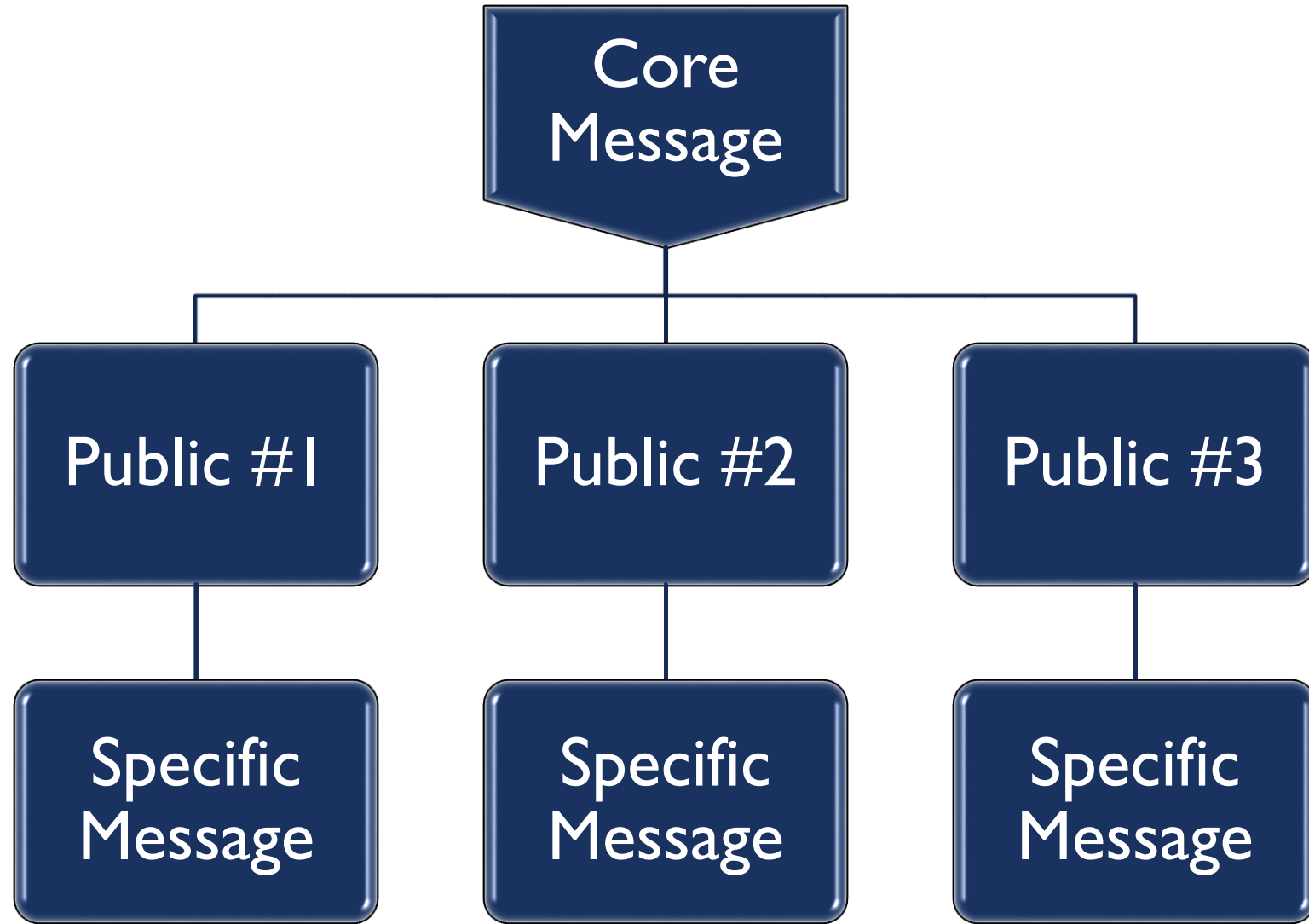


# THE CORE OF THE PLANNING PHASE

MESSAGE DEVELOPMENT AND THE TOOLS/TACTICS TO CARRY THE MESSAGES

## WHAT IS A “CORE” PR MESSAGE?

A CORE MESSAGE is a succinct statement of the core information that the organization intends to convey to its publics with the intended tone.



# MENU OF PR & COMMUNICATION TACTICS

Interpersonal channels of communication

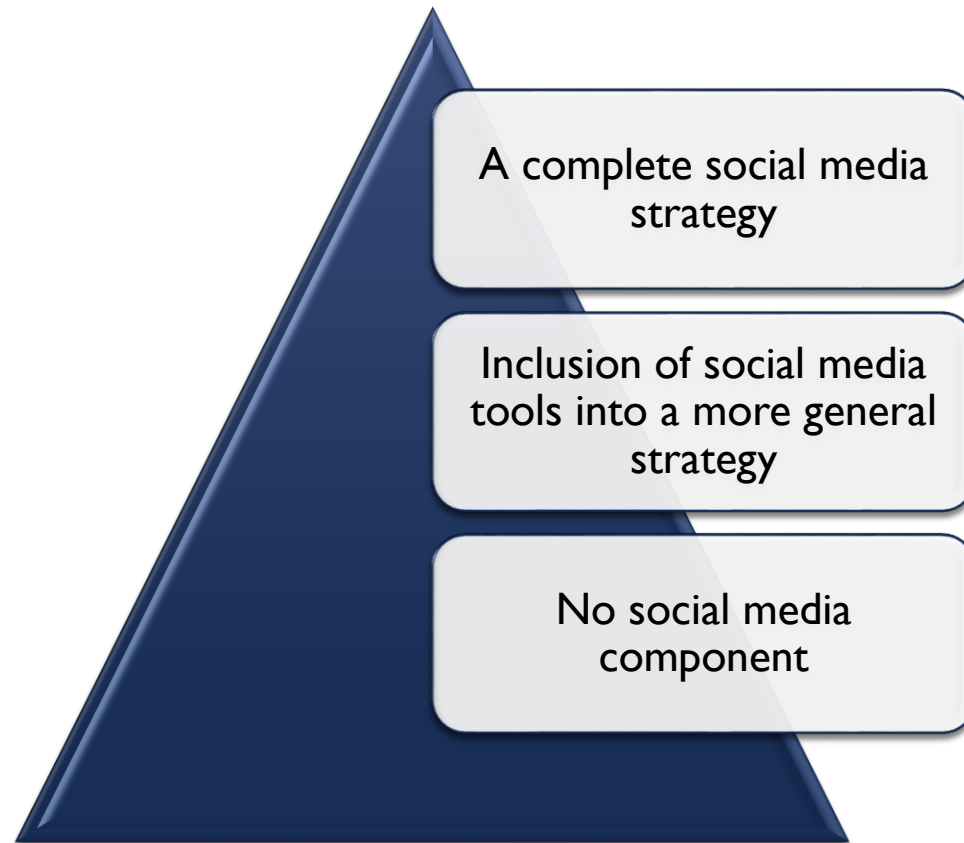
Organizational media

News media

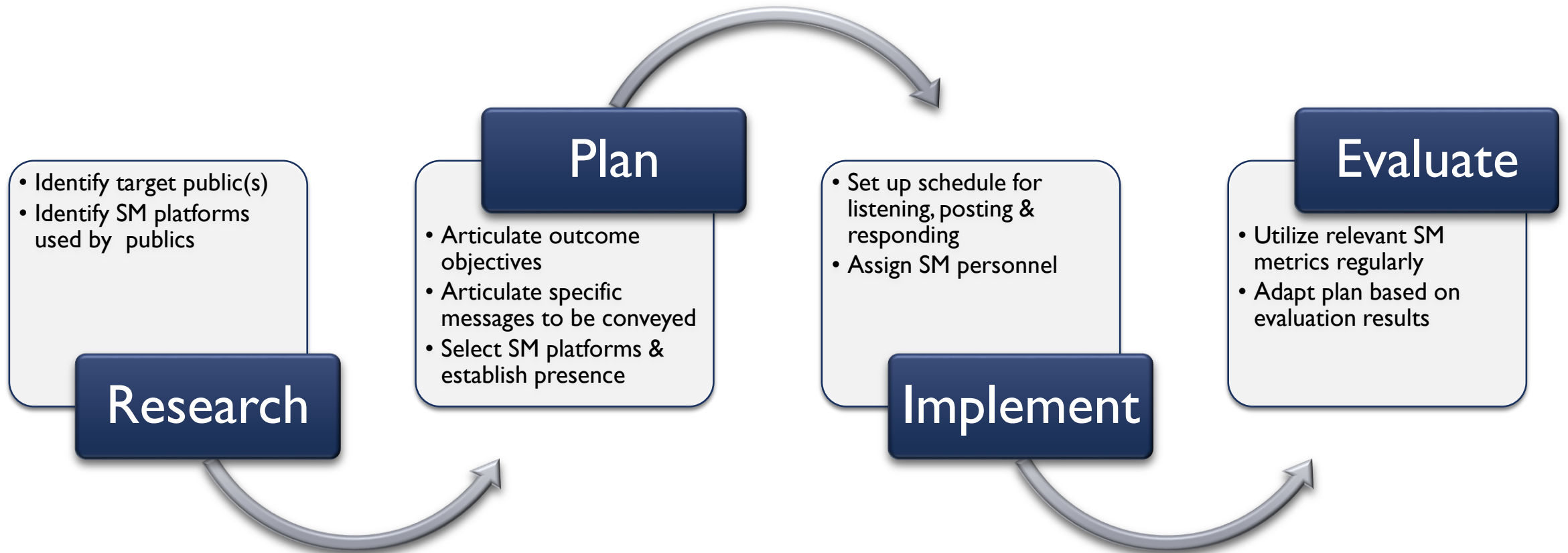
Advertising & promotional materials

Social media

# PLANNING THE SOCIAL MEDIA COMPONENT



# THE SOCIAL MEDIA PLANNING PROCESS



# CHOOSING THE RIGHT TACTIC(S) TO FIT INTO AN OVERALL STRATEGY

- What tactics will you use?
- How will these tools help the organization achieve its objectives?
- Are they appropriate for the specific public and objective?
- What resources will these tools require?
- Can you provide a rationale for the channels & strategies you choose?

## Summary of the Planning Phase

### Identify & describe focus public(s)

- A single PR project plan might focus on only one public or might focus on several
- The narrative description of each public is derived from the information collected in the research phase

### Propose overall goal & define specific outcome objectives

- The goal is the broad direction and end-point of the plan.
- The objectives are specific, measurable, realistic & deadline-driven.

### Articulate specific message(s)

- Each public has a specifically targeted message.

### Describe the strategy

- The overall approach to communicating the message(s) to the public(s)

### Select & design tools & tactics