Public Relations Planning

Effective public relations calls for a strategic planning process. This section of the book outlines a four-phase, nine-step planning model that can work for every kind of organization—corporate or nonprofit, large or small, well resourced or penniless.

Part 2 is presented as a how-to workshop. This approach presumes that you, the reader, are personally and actively engaged in creating a public relations plan for an organization in which you are involved. Thus the writing style in this section is more direct, more “you” centered. It offers a series of steps that unfold into a comprehensive public relations plan. Here is an overview of this process that will be fleshed out in over four chapters.

**Phase 1: Formative Research.** The focus during the first of the four phases is on the preliminary work of communication planning, which calls for gathering information and analyzing the situation. In three steps, the planner draws on existing information available to the organization and, at the same time, creates a research program for gaining additional information needed to drive the decisions that will come later in the planning process.

- **Step 1: Analyzing the situation.** Your analysis of the situation is the crucial beginning to the process. Everyone involved—planner, clients, supervisors, key colleagues and the ultimate decision makers—should be in solid agreement about the nature of the opportunity or obstacle to be addressed in this program.
- **Step 2: Analyzing the Organization.** This step involves a careful and candid look at three aspects of the organization: (1) its internal environment (mission, performance and resources), (2) its public perception (visibility and reputation) and (3) its external environment (competitors and opponents, as well as supporters).
- **Step 3: Analyzing the Publics.** In this step you identify and analyze your key publics—the various groups of people who interact with your organization on the issue at hand. You also will analyze each public in terms of its wants, interests, needs and expectations concerning the topic of this plan; each public’s relationship to the organization; its involvement in communication and with various media; and a variety of social, economic, political, cultural and technological trends that may affect it.

**Phase 2: Strategy.** The second phase of the planning process deals with the heart of planning: making decisions dealing with the hoped-for impact of the communication on the key publics, as well as the nature of the communication itself.

- **Step 4: Establishing Goals and Objectives.** In this step, you will focus on the ultimate position and the associated goals sought for the organization and for the product or service. This will help you develop clear, specific and measurable objectives for each key public.
- **Step 5: Formulating Action and Response Strategies.** A range of possible actions is available to the organization, and in this step you consider what you might do in various situations. It includes both public relations initiatives and responses to outside influences.
- **Step 6: Developing the Message Strategy.** This step deals with the various decisions about the message, such as the spokesperson presenting the message to the key publics, the content of the message, its tone and style, verbal and nonverbal cues, and related issues.

**Phase 3: Tactics.** During the third phase, you will consider various communication tools, and you will create the visible elements of the communication plan.

- **Step 7: Selecting Communication Tactics.** This inventory deals with the full range of communication options. Specifically, you will consider four categories: (1) face-to-face communication and opportunities for personal involvement, (2) organizational media (sometimes called controlled media), (3) news media (uncontrolled media), and (4) advertising and promotional media (another form of controlled media).
- **Step 8: Implementing the Strategic Plan.** With this step, you turn the raw ingredients identified in the previous step into a recipe for successful public relations plan, packaging those tactics into a cohesive communication program. You also will develop budgets and schedules and otherwise prepare to implement the communication program.

**Phase 4: Evaluative Research.** The final phase of strategic planning deals with evaluation and assessment. This enables you to determine the degree to which the stated objectives have been met. On that basis, you can decide about modifying or continuing the communication activities.

- **Step 9: Evaluating the Strategic Plan.** This is the final planning element, indicating specific methods for measuring the effectiveness of each recommended tactic in meeting the stated objectives.
Phase 1: Research

This chapter begins a step-by-step approach to planning a public relations campaign or project. It is the first of four such chapters that will walk you through each phase of creating an effective communication program.

Let’s look at the first phase of strategic planning for public relations, research.

You’ve heard the phrase “shooting in the dark.” It means trying to hit a target you don’t see. That’s what public relations without research would be. Research provides the foundation for strategic communication planning. Without research, you’d be sending messages of little value to your organization and little interest to your publics (who probably won’t be listening anyway). Research keeps you rooted in reality and prevents creativity from becoming merely bizarre.

The most common type of public relations research is **formative research**, the kind of fact gathering that precedes and shapes a campaign or project. It’s part of every good public relations activity. Even during crises when reaction time is short, most practitioners make time to do some research to get a quick read on public opinion or to pull from relevant existing research. There are two types of formative research: strategic and tactical.

- **Strategic research** is data that provides insight into issues and publics and to guide decisions on what an organization might do to address a situation.
- **Tactical research** is information that guides the production and dissemination of messages.

During this research phase, you will conduct a situation analysis to gather information in three key areas: (1) the situation you are facing, (2) your organization or client and (3) your intended publics.

Don’t let the idea of research scare you. Research begins with informal and often simple methods of gathering relevant information. You probably are already familiar with some of these techniques.

- **Casual research** informally collects what is already known. You “pick the brains” of clients, colleagues and others, interview colleagues with experience and other people with expertise, and brainstorm with other planners.
- **Secondary research** looks at information that already exists. Why spend time and resources to study what already has been studied? Instead, you can review what others have already learned and apply this to your research topic. Common sources of secondary research are organizational files, studies by trade and professional organizations, and government reports. Information also is available in libraries and online (but be wary about the validity of what you find on the Internet).
- **Primary research** is the gathering new information. This often includes more formal research methodologies. Three specific techniques—focus groups, surveys and content analyses—are frequent elements of public relations programs.

**Step 1: Analyzing the Situation**

The first step in public relations planning is to identify the **situation**, which is a set of circumstances facing an organization.

A situation for a football team might be the loyalty of fans. For a hospital, the situation could be knowledge (or lack thereof) of preventive medicine among would-be patients. For an auto manufacturer, the availability of side air bags. For a counseling organization, misunderstanding about mental illness.

Note that situations are presented as nouns—loyalty of fans, knowledge about health care, availability of air bags, misunderstanding about illness.

Make your research as wide reaching as possible. For example, if you are helping the football team focus on fan loyalty, start by learning what you can about how other teams maximize the allegiance of their fans.

Fan loyalty is a general concept, so don’t limit your research merely to football. Explore how baseball teams, hockey leagues and wrestling alliances interact with their fans. Study golf tournaments and racecar competitions, as well as international events such as the Olympics or the World Cup. Consider sports with small-but-loyal fan bases such as boxing and sumo, curling and polo. The point is, investigate many different examples of how sports-related organizations promote a supportive and ongoing relationship with their fans.

**Obstacle or Opportunity**

In classic terms, a situation refers to a **problem**. Don’t think of this as something necessarily negative. Rather, a problem is a question to be considered and answered, something that calls for our attention. (Knowing the derivation of the word might help.)
The word “problem” comes from ancient Greek and Latin words meaning “to put forward”; thus when we address a problem, we put forward a possible course of action.)

A public relations problem (the situation) can be positive or negative. Make sure there is agreement within your organization on these, because what one person may call an obstacle, another might see as an opportunity. Here’s a useful distinction.

- An **opportunity** provides an opening with a potential advantage to the organization. It is a problem in the sense that it offers an opportunity and a benefit. Examples of this might be fan loyalty or the introduction of an airbag feature on new car models, both positives that can enhance the organization and the publics.

- An **obstacle** is a roadblock to be overcome, something that can limit the organization in achieving its mission. This type of problem needs to be addressed to prevent disruption or unrealized potential. Examples might include the misunderstanding about mental illness or the lack of knowledge about preventing disease.

Consider the spiritual principle of zen, which values harmony. A problem is not something negative but rather something lacking harmony, a point of yet-unrealized potential. An obstacle is at a crossroads, allowing us to go this way or that.

The ultimate public relations problem is a **crisis**. Yet even that word gives us philosophical pause. Interestingly, the Chinese term wei ji and the parallel Japanese word kiki, both of which translate as “crisis,” are made up of two characters—one meaning “danger,” the other meaning “opportunity.” A crisis is a decision point where choices point to consequences.

Here are some real-world examples of good public relations that turn obstacles into opportunities.

**GOLD’N PLUMP POULTRY.** Because of consumer fears about industry-wide health risks such as avian flu, salmonella and arsenic in animal feed, sales were tanking for Gold’n Plump Poultry, the largest chicken company in Midwestern America. The company needed to address such consumer fears, attempting to turn an obstacle into an opportunity.

To accomplish this, Gold’n Plump spent $150,000 (£95,800, €119,000) on a six-month “Takin’ Names Tour,” driving an old farm truck to towns and villages in Minnesota and Wisconsin, asking residents to sign their names on the vehicle. For every signature, the company donated four meals to rural food shelves to help families in danger of losing their small farms.

The project generated media attention, reversed its sales decline, and rebuilt brand loyalty.

**DOVE SOAP.** Traditional marketing of beauty products uses idealized (and unrealizable) portrayals of women. Unilever, the British-Dutch consumer goods corporation, commissioned an international study on women’s attitudes toward beauty that became the basis for the Dove “Campaign for Real Beauty” by one of its companies.

Using mainly public relations tactics with strategic advertising support, the project focused on “real women with real bodies and real curves,” a departure from the supermodel approach taken by most competitors in the beauty-products industry. The campaign earned local and international news coverage and attracted millions of visitors to its website.

Ultimately the campaign not only sold beauty products but also sparked an international discussion about women and beauty. It also led to the Dove Movement for Self-Esteem, an international project of mentoring and education directed toward younger girls, with a goal of reaching 15 million girls around the world.

Even in crisis situations, obstacles can be approached as opportunities, if the problem has not been self-inflicted. Public attention generated by a crisis can help an organization explains its values and demonstrate its quality.

Whether the issue is viewed as an opportunity, an obstacle or simply an unrealized potential, the communication team and the leaders of the organization or client need a common understanding of the issue before it can be adequately addressed. Ideally, it means trying to turn an obstacle into an opportunity.

Fast-food chains such as McDonald’s, Arby’s and Burger King, for example, could have ignored growing international concerns about obesity, particularly long-term effects on young people. Instead these companies anticipated a growing concern and introduced healthier low-calorie menu items.

Public relations practitioners call this **issues management**, a process by which an organization tries to anticipate emerging issues and respond to them before they get out of hand. This involves monitoring and evaluating information, potentially leading to change. The name for this is **adaptation**, the ability of an organization to make changes on the basis of what its publics want and need.

Early identification of important issues can give an organization time to study them and develop an appropriate and effective response. This is one reason that research skills are so important for public relations practitioners.

Why is all this important? To be effective, all organizations must be prepared to act as circumstances change. As consumers weigh health-care choices and as regulatory agencies impact the cost of health care, organizations such as insurance companies,
hospitals, pharmaceuticals and medical providers try to predict trends within the health-care industry and in some way to influence its future.

Some organizations use a **best practice** approach by studying and potentially imitating a leader in the field. A hospital wishing to site an off-campus methadone clinic might see how a hospital in another city was successful in a similar project. The hospital might even look to the failure of similar efforts in other cities, learning from the mistakes.

Issues management helps the organization interact with its publics. It may help an organization settle the issue early or divert it, or perhaps even prevent its emergence in the first place. More likely, however, the organization will have to adjust itself to the issue in some way, trying to maximize the benefits or at least minimize the negative impact. Public relations often drives this early-warning system within an organization.

Closely related to issues management is **risk management**—the process of identifying, controlling and minimizing the impact of uncertain events on an organization. Public relations people often have early access to criticism from various publics, which is especially important if others inside the organization fail to observe signs of unrest.

**Duke University.** Risk management involves a careful assessment of the potential impact on both the organization and its publics. Often this means taking into consideration the emotional elements that may be in play.

An example of this is the “perfect storm” effect of the Duke University rape case in 2006, what a British newspaper called a “gourmet feast, a deluxe news-hook omelette.”

The ingredients in that dish catapulted the case into a major public relations crisis: race, sex, class and privilege, credibility, firings, legal reversals, politics, police collusion, media scrutiny, cause advocates, athletic suspensions and premature campus reaction.

Eventually the legal charges were dismissed, but not before Duke and its athletic program were drawn into extended international negative publicity—much of which might have been minimized if the school had a carefully drawn crisis communication or risk management plan.

**Nestlé International.** Nestlé saw itself as a nurturing company, failing to recognize the intensity of criticism over its marketing of infant formula.

As international opposition mounted, the resulting boycott and related protests involved more than 100 countries, beginning in the late 1970s and continuing 3½ decades later. The opposition and the negative publicity it inspired cost the Swiss-based corporation millions in bad publicity, lost customers, legal fees and a weakened reputation.

Despite the opposition, Nestlé remains the world’s largest nutrition company worth about $200 billion (£128 billion, €58 billion).

Yet it undoubtedly would be even stronger if the protests had not spurred bans on Nestlé products in schools and colleges, government bans on some of the company’s products, links to deforestation as Nestlé companies destroy forests to create palm oil plantations for beauty products, accusations of child labor on Nestlé-supported cocoa plantations, and a continuing (and seemingly growing) list of complaints and criticisms, many with long-term legal and economic impact.

**Dow Corning.** Another classic case study in crisis communication involved silicone breast implants. Dow Corning saw itself as a conscientious company and believed that science was on its side, so it aggressively countered criticism and public concern about the safety of its breast implants.

When class-action lawsuits began to be filed, the company failed to take quick action. It didn’t think any response was needed. Instead, the corporation followed common (and bad) legal advice to say nothing sympathetic about women who claimed they were harmed by the company’s project. Dow was prepping the case for legal courts while ignoring the court of public opinion, where reputations are made and broken.

The case yielded record settlements: $5.4 million (£3.4 million, €4.2 million) to one woman, $7.3 million (£4.7 million, €5.8 million) to another, $27.9 million (£17.8 million, €22 million) to three women. Dow Corning ended up in bankruptcy for nine years, emerging only in 2004, two decades after the problem began.

The irony is that Dow Corning’s science eventually was vindicated. Multiple studies have since concluded that there is no connection between the implants and breast cancer. But the fact remains that the company’s public relations fiasco has become a textbook case of how to mismanage a crisis.

**Exxon.** This oil giant was another company that refused to take the critics seriously, apparently having little interest in risk management. As a result, the company suffered in the long term for mishandling the Alaska oil spill caused by its freighter Valdez in 1989.
Eleven years later, a jury ordered the oil company to pay $3.5 billion (£2.2 billion, €2.8 billion) for defrauding Alabama on royalties involving oil wells in the Gulf of Mexico. That verdict was set aside, and in a new trial three years later, the jury awarded even higher damages to the state: $11.9 billion (£7.6 billion, €9.4 billion). Jurors said one reason for the high penalties was that the Alaska situation showed them that Exxon was a company that could not be trusted and deserved to be punished.

Appeals and counterclaims continue, costing ExxonMobil millions in legal fees. The Alaska spill is still cited in other unrelated lawsuits in the U.S. and elsewhere, such as in Venezuela where Exxon received less than $750 million (£478 million, 594 million) in 2012, little more than 6 percent of the $12 billion (£7.7 billion, €9.5 billion) it had been seeking for five years since when Venezuela nationalized Exxon’s operations there.

The purpose of issues management is to deal with issues before they get out of hand. When that happens, the issue becomes a crisis. Crisis management is the process by which an organization deals with out-of-control issues.

Consider this analogy: Issues management is like sailing. You run with the wind when it’s blowing in the direction you want to go. You tack to make some progress against the wind. Sometimes you stall when there is no wind. But always, you adapt to an ever-changing environment.

In a crisis situation, you try to ride out a storm. Often that means you drop sail, hang on, and hope the vessel is strong enough to survive without too much damage. Issues management deals with preparation for dealing with potential events; risk management is about implied threats; and crisis management focuses on reactive response to actual occurrences.

An organization committed to the concept of strategic communication is probably engaged in an ongoing issues management program that identifies crises in their early stages. Less nimble organizations may be caught off guard by a crisis.

Reality sometimes slaps you in the face and forces you to think the unthinkable. It happened at Virginia Tech and Columbine High School, at the movie theater in Aurora, Colo., and at the youth camp at Buskerud, Norway. It happened with the Al Qaeda attack on the World Trade Center and the Boko Haram attacks on churches and businesses in Nigeria. The unthinkable also burst onto the scene with the earthquake/tsunami/radiation leak at Fukushima and when the Costa Concordia cruise ship grounded and sank off Italy.

Forward-thinking organizations prepare for the unthinkable and plan for unexpected disasters.

TYLENOL. What happened in Chicago in 1982 remains an example of how companies should face the unthinkable. Johnson & Johnson woke up in crisis when somebody laced Tylenol capsules with cyanide, killing seven Chicago-area residents. That’s an unthinkable tragedy for a pharmaceutical company.

As the country panicked, Johnson & Johnson pulled 31 million bottles of Tylenol from store shelves. The company used satellite news conferences to reintroduce Tylenol the over-the-counter medicine with a triple-seal tamper-resistant package that soon became an industry standard. Johnson & Johnson also offered customer incentives such as free replacements and discount coupons.

The company saw a quick recovery of its 35 percent market share and in the process fostered an ongoing customer loyalty. Because of its good reputation and its responsible handling of the still-unsolved murders, the company emerged from the crisis with even more consumer respect and confidence.

More than 30 years later, the legacy of Johnson & Johnson is a case study in good crisis communication and solid public relations, a morality tale that shows the value of a corporate conscientiousness that places its customers first and keeps its promise of safety.

Considering subsequent scandals involving Blackwater, Enron, WorldCom and Arthur Andersen, obviously some companies didn’t get the point. But those that did noted the value of proactive management and quick communication in crisis situations. Forward-looking companies realized that preparedness is the key to effective issues management, particularly in crisis situations.

Some experts have banded together as a kind of self-help group to guide each other in risk and crisis situations. One such coalition is the British-based Crisis Communications Network (CCN), a register of business and communication people with experience in managing crises that is associated with the Institute for Public Relations. The CCN network offers several tips for issues management:

• Develop active dialogue with various stakeholders.
• Make sure an issue is worth trying to manage.
• Nurture expert contacts that can provide third-party research and endorsement when necessary.
• Form a coalition with organizations similar to yours.
• Create a risk-management plan and review it regularly, updating and modifying it as necessary.


- Include senior management on this team.

One thing to remember is that crises may be sudden and unpredictable, but they seldom are unpredictable. Crises are more like volcanoes that smolder for a while before they erupt. Warning signs abound, if a trained eye is watching.

Studies by the Institute for Crisis Management (crisisexperts.com) consistently find that only about 40 percent of companies’ crises burst suddenly onto the scene, while 60 percent have been smoldering situations that eventually ignited. The biggest crisis categories involve white-collar crime, followed by facility damage, accidents, workplace violence, labor disputes and mismanagement. The institute finds that about half of all crises are caused by management, a third by employees, and the remaining few by outside influences.

Even crises triggered by natural disasters such as floods and earthquakes often are linked to human error or unprepared management. The nuclear disaster at Fukushima—radiation leakage triggered by a tsunami caused by an ocean earthquake—was worsened because of poor communication, lack of preparation and low government standards.

**Deepwater Horizon.** The Deepwater Horizon oil spill in the Gulf of Mexico has been called the worst environmental disaster in North American history. It also was a public relations debacle for British Petroleum.

The events are well known: A deep-sea explosion off the Louisiana coast killed 11 oil-rig workers and led to the release of nearly 200 million gallons of oil that polluted an area of 3,900 square miles.

The out-of-control spill and efforts to cap the well led the news for weeks. The economic impact was severe: $2.5 billion ($1.6 billion, €2 billion) in immediate damages to fishing industry and $24 billion (£15.3 billion, €18.9 billion) to tourism, with predictions of decades-long effects. BP estimated the cleanup costs would mount to nearly $40 billion (£25 billion, €32 billion), and more than two years after the disaster, BP was still haggling with the federal government and the states of Louisiana and Mississippi over its share of the costs.

BP, once considered the greenest oil company in America, was blamed for the disaster and criticized for how it handled the tragedy. For the early weeks of the spill, its British CEO, Tony Hayward, was the face of BP. He had a reputation in Britain as being a knowledgeable and trusted corporate leader. But the confusion surrounding the facts in the crisis were on him. Then he was photographed sailing in a yacht race at the height of the crisis, followed by an outburst about “wanting his life back.” Hayward resigned several weeks after the explosion.

How did BP handle its crisis communications? First it tried to blame others: drillers it had hired, owners of the rig and government regulators. This violated one of the tenets of good crisis communication: Accept responsibility for fixing the problem, and don’t lay blame.

Rather quickly, BP’s public relations strategy turned toward the future: how the company would contain the spill and compensate the victims. BP set up a $20 billion (£12.7 billion, €15.8 billion) fund to reimburse victims for their economic loss. It was a good move, though one later threatened by charges that BP mismanaged the fund.

Critics observed that BP lost public confidence by ceding to the media the task of providing public education about deep-water drilling. It let others tell its story. BP eventually created an educational component to its website, but the details were too technical and confusing for most visitors.

A year and a half after the spill, BP engaged in some heavy-duty image repair with advertisements reporting that the gulf ecology was not severely damaged and that the fishing industry is showing signs of economic recovery. BP hired chefs Emeril Lagasse and John Besh to promote gulf seafood, and it gave away fish tacos and seafood jambalaya at Sugar Bowl parties in New Orleans.

Inevitably, the Deepwater Horizon spill drew parallels with the rupture of the Exxon Valdez 21 years earlier, the classic example of bad crisis communications. What are the public relations lessons of the two disasters?

Both companies made public relations blunders in appearing to emphasize technology over people. Both seemed to minimize the environmental consequences, and the emotional reaction to oil-slicked birds and oil-drenched shorelines. But BP was quicker to compensate fishermen and other victims, and it cooperated with government regulators more than Exxon did.

Another difference concerns fault. The Valdez spill was caused because the ship’s captain was not at the helm, and the cleanup was delayed because the company had removed cleanup equipment from the area prior to the accident as part of a corporate strategy to de-emphasize the risk of such a spill. The public concluded that the Exxon spill was the fault of Exxon. On the other hand, the gulf explosion resulted from the failure of safety equipment on a rig owned and operated by another company.

Both companies were accused of minimizing the extent of the spill and the environmental consequences. BP’s fault was more that it tried to remain optimistic that things were moving faster toward containing the spill. It low-balled estimates of how much oil was being discharged, though some of this was based on what BP itself knew at the time.

Neither company appears to have had a workable crisis communications plan to address a worst-case scenario. Not only were the disasters unanticipated, but also the companies seemed not to know how to act once they occurred.

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But there are some significant differences that lead to the conclusion that BP handled the situation better than Exxon did. For the most part, BP’s corporate leaders were seen as part of the potential solution, rather than as avoiding responsibility and ducking public exposure as was the case in the Valdez spill. BP produced fewer contradictory statements.

**Step 1 Worksheet: Analyze the Public Relations Situation**

The focus in Step 1 has been on identifying and analyzing the nature of the issue you are addressing. It may be a routine activity in the life of an organization or it may be a crisis situation. Your purpose in Step 1 is to make strategic decisions about the nature of the issue that later will guide you in addressing it.

Specifically, answer these four basic questions:

1. What is the situation facing the organization?
2. Do you consider this situation an obstacle or an opportunity?
3. What is the significance or importance of the situation?
4. How might the situation be addressed for the mutual benefits of everyone involved?

You may also flesh out these basic questions by considering whether the situation is new or ongoing, how it is linked to the organization’s mission, what trends may be associated with it, and the extent to which it is a priority for the organization.

**Planning Example for Step 1**

This is the first of an evolving example of the planning steps in action. It focuses on the hypothetical G^X (Global Exchange), a nonprofit advocacy organization that supports a variety of international engagements between young adults in professional environments. The organization works with several professional organizations to support international internship opportunities and supports university exchange programs. To make this scenario easier to understand, we’ll focus on a local chapter of this organization in a mid-sized city.

The situation that G^X is dealing with involves the value of international engagement among young professionals. Overall, G^X considers this to be an opportunity, though it also involves some obstacles to be overcome.

G^X believes that there are several advantages to global engagement on a personal professional level. Among these are practical enhancements for an individual’s career, networking opportunities, expansion of job skills, strengthened communication and interpersonal skills, and personal development. Opportunities also are present for businesses and nonprofit organizations, which benefit from employees with these qualities, as well as potential business connections that can result from international engagement.

Research by G^X also reveals some impediments to this, including the cost in time and money, ignorance of the professional benefits of this engagement, a feeling of being insufficiently prepared, and a sense of cultural superiority.

The significance of the issue is that valuing international engagement is central to the mission and vision of success for G^X.

In considering this situation, G^X is researching organizations such as university exchange programs, international business internship programs, and international service organizations. It also has investigated several discipline-specific programs involving Canada-Mexico-US journalists, UK-Australia engineers, France-UK-US chefs, and other global exchange programs for accountants, lawyers, nurses, teachers and business executives.

Ideally, the situation will be handled in such a way as to address the benefits of international professional engagement as well as to deal realistically with the obstacles.

**Step 2: Analyzing the Organization**

Effective communication involves self-awareness. This calls for a close look at the organization: its performance, reputation and structure. The process is the same for all types of corporations: small family businesses, multinational or transnational corporations, regional companies and so on. Likewise noncommercial enterprises such as schools and hospitals, government, membership associations, nongovernmental organizations, and cultural and religions organizations all require the same measure of self-awareness.

What follows is a breakdown focusing on internal environment, public perception and external environment.
Internal Environment

Public relations involves more than words, and an audit of an organization’s strengths and limitations begins with a candid understanding of what the organization is and does. Here are some areas you will need to assess as you enter Step 2 of the strategic planning process.

- **Performance.** This is the most important aspect of an organization’s internal environment. It involves the quality of the goods and services provided by the organization, as well as the causes and ideas it espouses.
- **Niche.** This focuses on the organization’s specialty, the function or role that makes it different from other organizations.
- **Structure.** The audit considers how the public relations operation functions within the organization. This includes both the mission of public relations (for example, whether it sits at the management table where decisions are made) and the financial, equipment and personnel resources it has for doing public relations.
- **Ethical Base.** Public relations has been called the conscience of an organization, giving it moral grounding. In analyzing the internal environment, give thought to this ethical base, and identify the values and operating principals that are important to the organization.
- **Internal Impediments.** End your analysis of the internal environment with a look at the impediments or obstacles within the organization that might impede the public relations program. Remember that impediments are merely temporary roadblocks to be circumvented, rather than permanent blockages.

Public Perception

The next task in preparing your public relations audit is to consider what people know and think about the organization.

- **Visibility.** Examine the extent to which the organization is known, and the accuracy of the information people have.
- **Reputation.** This deals with perception, what people think about the organization based on what they know. Reputation is part of the social capital of an organization; arguably it’s the most important public relations asset. Reputation is based on what the organization says but more so on what it does, and on what others (including the media) say about it.

External Environment

This part of the analysis looks at how outsiders might impact an organization.

- **Supporters.** Every organization has a group of people who currently or potentially can help the organization achieve its objectives. Make sure you know whom they are.
- **Competitors.** Likewise, most organizations have people or groups who are producing similar goods, performing similar services, or espousing similar ideals. In highly competitive environments, it is important for public relations to understand the role of others on the field.
- **Opponents.** Many organizations also have groups who organize in some way to counter the organization. These groups may be advocates of an opposing cause, dissidents who oppose you because of your stance, activists organized to foster change at odds with your organization’s products or services, or any number of other types of opponents.
- **External Impediments.** Other political, social or economic factors may limit the effectiveness of an organization.

Step 2 Worksheet: Analyze the Organization

Step 2 has focused your attention on the organization itself. It calls for introspection and candor. Here are some questions dealing with the organization’s internal environment:

1. What is the quality of the organization’s performance?
2. What communication resources exist?
3. How supportive is the organization of public relations activity?

Here are questions about the public perception of the organization:

4. How well known is the organization?
5. What is its reputation?

Finally, some questions on the external environment:

6. What is the major competition?
7. Does any significant opposition exist?
8. Is anything happening that can limit the effectiveness of the organization?
Planning Example for Step 2

The internal environment of G^X is strong and open. It has strong support with a small number of organizations, particularly environmental nonprofit organizations and businesses with engineering and technological focuses. G^X leaders are on record as seeing a potential for expanding into other sectors.

The quality of G^X services is high; the cost of those services are relatively low, due in part to some past grants by the state Business Development Council, though there is no certainty of receiving future grants from this agency.

Communication resources for G^X include a part-time staff person with experience in media relations, and several volunteers with interest and skills in social media. In the past, the organization often worked directly with business associates and did not have a media plan. New board direction is pushing the need for a more proactive strategic approach to communication.

In terms of its public perception, G^X is known by some organizational executives, but it has a low visibility among rank-and-file employees and in the general community. Where it is known, the reputation is generally positive. Past partner companies have described G^X as being well organized, reliable and cost-effective.

The external environment seems not to involve any organized opposition, nor are there other organizations with a parallel mission. Some service clubs do small projects involving international business exchange, and the state Economic Development Council occasionally organizes short-term discipline-specific visits to other countries.

Overall, G^X has been hurt by a weak economy, but this is changing as local companies emerge from the economic slump and once again are looking toward long-term interests of building a productive workforce in increasingly competitive circumstances. Financial belt-tightening has caused the largest local university has cut staff in its international exchange program, creating a potential void that G^X might fill.

Step 3. Analyzing the Publics

A public is a group of people that shares a common interest vis-à-vis an organization, recognizes its significance, and sets out to do something about it. Members of publics are homogeneous in that they are similar in their interests and characteristics. They usually are aware of the situation and their relationship with the organization. They think the issue is relevant, and they are at least potentially organized or energized to act on the issue.

A public is like your family. You don’t pick them; they just are—generous Cousin Ezekiel and crazy Aunt Bertha. Publics may be helpful or annoying, friendly or not, but an organization must deal with them regardless. They exist because they share an environment and interact with the organization.

Note some important differences among publics and related groupings. If a public is like your family, a market is more like your friends. You pick them; they pick you. Organizations identify markets by determining that might be interested in buying their products or using their services.

An audience, meanwhile, is merely a group of people who pay attention to a particular medium of communication—people who read the same blog, watch the same TV program, or follow the same person on Twitter. Audiences are important for public relations only to the extent that they include members of an organization’s public.

A final category, stakeholder, is a bit fuzzy because it has different meaning. Some see stakeholders as groups of people relating to an organization on the basis of its mission and objectives, as compared to publics that relate on the basis of the organization’s message. Others suggest that stakeholders care about an organization, whereas publics may or may not care. So far, there is no consensus among public relations practitioners that stakeholders are in any way significantly different from publics. This book treats stakeholders as synonymous with publics.

Characteristics of Publics

When you identify publics, you can look for five distinguishing characteristics.

- **Distinguishable.** A public is a recognizable grouping of individuals, though not necessarily a formal group. For example, a public for a jewelry company might include people getting engaged or people celebrating significant birthdays or anniversaries. Not formal groups, but groupings of people with common interests whom you can communicate with.

- **Homogeneous.** A public’s members share common traits and features. They may not know each other, but they have enough in common for you to treat them as a group.

- **Important.** Not every identifiable group is worth your attention. A public has a potentially significant impact on the organization, and vice versa.
Large Enough. A public should be large enough to warrant the organization’s time and resources. Generally, a handful of people would not be considered a public but rather could be dealt with in personal ways.

Accessible. A public is a group with which you can interact and communicate. A community college might find it relatively easy to interact with potential students because they all live in a small geographic area. But an internationally renowned university would have a much harder time connecting with potential students thinly scattered throughout the world. The difference might mean that the community college could push messages out, but the university would have to more passively respond to inquiring potential students.

Categories of Publics

It becomes a bit easier to identify publics if they are subdivided into four categories. This is based on the concept of linkages, the study of how organizations and groups are interrelated.

Customer. The most obvious type of public is the customer. These are people who receive the products or services of an organization. They may be purchasers, clients, students, fans, patients, patrons, shoppers, parishioners, members and so on. They may be current, past or potential customers.

Producer. These are the publics that provide input to the organization. They include employees and volunteers, unions and management, vendors and suppliers, and donors and investors.

Enabler. One useful category of linkages involves enablers, groups that help organizations exist and prosper. These include regulators, professional standard setters, opinion leaders, colleagues and the media.

Limiter. On the other hand, there may be groups that inhibit organization, such as competitors, opponents and hostile forces. While the media should first be considered enablers, public relations practitioners have learned that some (such as an antagonistic blogger or an unfriendly TV network) occasional become limiters.

Publics in these categories generally are in direct relationships with the organization. However, there are some other publics that are more distantly linked.

Public relations identifies a secondary customer as the customer of your customers. Examples are businesses that might hire a university’s graduates or a graduate school that might attract applicants them for advanced education.

An intercessory public bridges the organization and its publics. In everyday life, we often ask a friend or colleague to intercede for us, put in a good word as we look for a job, go for a loan, or seek a date with the new staffer who works in another department. In professional terms, organizations may direct attention to groups that are already in contact with a key public. In this step of the planning process, identify such potential associates for networking possibilities later on.

In addition to intercessory publics, we sometimes deal with intercessory individuals. An opinion leader is a person with a particular influence on an organization’s publics. Research shows that the media often influence opinion leaders such as business leaders, political figures, teachers, clergy, celebrities, media commentators and others who in turn influence an organization’s publics. Opinion leaders often generate word-of-mouth support for an organization or its products, services or causes.

Where are opinion leaders located? Everywhere, it seems, depending on the issue involved. A study at Shih Tsin University in Taiwan asked more than 2,000 people around the world where they get information on energy and technology. The finding reported that 68 percent of respondents get their day-to-day info online (from personal, professional, organizational and media sites), 11 percent from magazines, 6 percent from television, 6 percent from newspapers, 2 percent from radio, and 7 percent from other sources.

Coca-Cola in Egypt. Opinion leaders can be especially important when practicing public relations in an international context.

Pepsi has always been the soft-drink standard in Egypt and in most other Arab countries. To its cultural detriment, Coca-Cola has been linked with non-Arab Western interests and with American consumerism. An old saying in Egypt, laden with cultural implications, is that Pepsi is for Arabs and Coke is for Jews.

A rumor circulated in 2000 that Coca-Cola was anti-Islam, “proof” of which was that when the Coke logo was view upside-down in a mirror, it read as “No Mohamed. No Mecca.” Or not. Regardless, Coke sales plummeted 20 percent. Protests erupted. Some areas of the country banned Coke advertising and signage.

Coca-Cola Egypt decided to move quickly, with a particular emphasis on the concept of opinion leader. The company requested a meeting with the grand mufti, the country’s top religious leader, asking his advice. It also asked a panel of Islamic scholars to consider the matter. Both the grand mufti and the scholarly panel ruled that the rumor was unsubstantiated.

In a public statement, the religious leader scolded those who disseminated the false rumor for risking the jobs of thousands of fellow Muslims employed by Coca-Cola. He also later said in interviews that he himself enjoyed a daily Coke.
Besides relying on news coverage of the intervention, the company highly advertised the grand mufti’s statement and gave copies to its drivers, distributors and sales people. Within weeks, sales returned to pre-crisis levels where Coke, though still a distant second in the cola wars, was playing in a more even cultural environment.

Today, marketing reports suggest that Coke accounts for about a quarter of the youth market in Egypt, still trailing Pepsi, which remains the No. 1 soft drink throughout most of the Middle East.

Key Public

Every organization has many publics, but no public relations plan will be successful if it tries to engage everyone. Instead, practitioners prioritize the various publics and select a few key publics, also called strategic publics. (Note that some sources call these “target publics,” though that term implies one-way communication that fails to focus on mutual engagement.)

Once the key public is identified, the planning process focuses on analyzing each. Much of the needed information will come from informal research such as interviews and brainstorming; some of it may require formal techniques such as focus groups and surveys. Here are some things to look at in analyzing each key public.

• Public Relations Situation. Assess the public’s wants, interests, needs and expectations related to the issue, as well as what it does not want or need. Consider relevant attitudes of the public.

• Organization. Consider each key public’s relationship with the organization—how your organization impacts the public and vice versa. Consider the extent that the public understands this relationship and knows about the issue at hand. Also consider the visibility and reputation of your organization with this public.

• Communication Behavior. Study the public’s communication habits, such as the media or communication channels it uses. Identify opinion leaders and others who might be credible message sources. Indicate whether the public is seeking information on the issue. (This assessment will have major impact later when you choose your communication tools, because information seekers are likely to initiate communication or make use of tactics that require their direct involvement.)

• Demographics. Identify demographic traits such as age, income, gender, socioeconomic status, or other relevant information about this public.

Conclude your analysis of the key publics with a benefit statement. Clearly articulate the benefit or advantage your product or service can offer this public, or the way you can help satisfy its need or solve its problems.

For example, the benefit a community foundation might offer its donors could be stated as follows: “The Equity Foundation offers donors the opportunity to pool their money with the donations of others, thereby compounding small donations into larger, more effective grants with a greater impact on the community.”

In more of a marketing vein, the benefit an online bookstore might offer college and university students could be written as this: “Cyber Booksellers can assure university students that it can provide class textbooks at discount prices with immediate delivery.”

Cultural Context

Publics don’t exist in a vacuum. Understanding their cultural context is crucial in this research phase of the strategic planning process. Public relations practitioners who give a priority to learning the nuances of the culture in which the publics exist are likely to develop campaigns that can be successful.

This is particularly important in the international arena. What works in one culture may not be appropriate for another.

Even basic communication can be hampered in international contexts. Language itself can be a barrier to communication. This is particularly true in Africa. South Africa, for example, has 11 different national languages. Nigeria has about 500 languages and dialects, with English as the official language used mainly in cities, making it very difficult to mount any country-wide communication program.

Technological differences can add to the problem. Social media and mobile media so common in Western societies are not present enough in some parts of Africa to make them useful tools for public relations, though this is changing rapidly as many countries are experiencing sustained growth in cellular technology. Social media may be banned or censored in some countries.

Outsiders do themselves and their public relations interests a disservice when they fail to understand the diversity that exists within a culture. In the US, for example, public relations practitioners should understand that there are major differences within the Hispanic community. Mistaking cultural perspectives among Puerto Ricans, Cuban Americans and Hispanics from the Dominican Republic, say, can create embarrassment for organizations and counterproductive responses from publics. Likewise Mexican, Panamanian, Columbian and other Latin American cultures may share a common language base, but from a public relations perspective they may have more differences than similarities.
Likewise with Asian Americans from very different national and cultural backgrounds. About the only thing they have in common is that non-Asian Americans tend to see them as all being the same.

Situations can get even more complicated when applied to other countries. Some nations such as Mexico, Canada, Australia and Japan—as well as the US—have historic tensions between indigenous peoples and the dominant culture. Others experience significant differences, even hostility based on language (such as Canada and Ukraine), religion (Uganda, India and sporadically in Northern Ireland), race (South Africa) or tribal background (Rwanda).

Gender roles and socially acceptable relations among men and women also vary greatly, as do social attitudes toward people who are gay, aged, disabled or otherwise different from the social norm.

Step 3 Worksheet: Analyze Key Publics

In Step 3 you have focused on your key publics—who they are, what they are like. Most importantly, you have looked at ways to identify the interests and aspirations of each key public, which is the needed foundation for eventually formulating to appeal to each.

Here are four basic questions to be addressed in Step 3:

1. What are the major publics for your organization on this issue (the key publics)?
2. What is the nature of each key public?
3. What are the major wants, interests, needs and expectations of each key public?
4. What benefits can you offer each public?

You can build on these questions with more probing information about the awareness of each public toward these potential interests, whether the public is seeking information on the topic, and who might be influential opinion leaders.

Planning Example for Step 3

Here is a listing of publics for GX:

- **Customers** include local organizations with international counterparts and young professionals (to age 35). Potential customers include university seniors and graduate students in professional programs.
- **Producers** include GX staff (2 full-time, 3 part-time); volunteer workshop presenters (approximately 14); 9-person board of directors of the local chapter. Producers also include the donors including individuals, foundations, corporations and grant-giving agencies and organizations.
- **Enablers** include the news media (general, business-oriented, cultural and university-based); social media with professional or global interest; professional and business organizations with an international perspective; and cultural organizations with a global/intercultural agenda. Opinion leaders include university faculty in professional programs. Enablers also include approximately 35 current and past participants in the GX international programs, as well as their employers and professional mentors/colleagues. Another category of enablers includes groups and individuals associated with trade organizations, foreign consulates and (at a greater distance) foreign embassies.
- **Limiters** include banks that are cutting back on loans. There are no apparent opponent groups.

After due consideration, three key publics for this campaign are identified:

1. Young business professionals, and university seniors and graduate students in professional programs
2. Companies, nonprofit groups and professional organizations with global perspective
3. News media (particularly business-oriented media) and associated social media

Here is an analysis of each key public:

1. Young business professionals and university students want an opportunity to be successful in their careers, especially by pulling ahead of others competing for the same jobs. They use various media, particularly social media, though they are likely to pay attention to professional media that addresses their career interests. By definition, this public is young. It has better-than-average education and reflects the general ethnic, racial, lifestyle and religious demographics of university graduates living in this area. This public is likely to be open to mobility, travel and intercultural/international engagement. Collectively these are wants and interests, though perhaps this public would not identify them as needs.
2. Companies, nonprofits and professional organizations want and need opportunities to be more competitive and more effective in their work. An interest is to have a workforce of people who are open, creative, resourceful, motivated, and committed to both customers and the company.

3. News media want and need information that is newsworthy, available and relevant to their audiences.

Here is the benefit statement: \( G^X \) can provide information to each of these key publics that will interest them and will satisfy their wants and needs.