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STRATEGIC PLANNING IN PUBLIC RELATIONS

A PRACTICAL GUIDE

Kieran Knights

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The author

Kieran Knights is a consultant in strategic planning for public relations. Until 2001 he was Planning Director at Shandwick International, a position he had held since 1996. In a career stretching back more than 20 years he gained experience in various roles in PR, including Editorial Director of Bryant Jackson & Associates. He began his professional life as a journalist, having studied at the London College of Printing.

Kieran's clients have included Unilever, Whitbread, McDonald's, SmithKline Beecham, Nestlé and HP Foods. He has won major awards for a number of his campaigns, including the 'Sweetex Woman of Today' (for Crookes Healthcare) and 'Ladybird Kidswear' (for Woolworth's), which both received awards for Outstanding Consultancy Practice from the Public Relations Consultants Associations, while 'Dads Today' – a publicity-led research initiative for Woolworth's – won an international Mercury Award.

As one of only a handful of PR planners in the UK Kieran has been an active champion of the strategic planning discipline. He is a frequent speaker at conferences and seminars around the UK and is a member of *PR Week's* 'Proof Forum' which debates industry policy on evaluation and planning.

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Chapter 1: What is strategic planning and why do we need it?

Introduction

As our subject is planning we should take a planner's approach to the task of tackling this Report. This means beginning by setting some clear objectives. What is it that you want to achieve by reading this? Maybe you're simply looking for something interesting and informative. If so, that's fine but it would be more helpful if you could consider in some more detail what you want to get out of it. You should be able to look back at your objectives when you get to the end of the Report, and decide whether you've achieved everything you originally wanted to achieve. Jot down your thoughts on a piece of paper and slip it into the back pages for future reference.

This Report is intended to provide an introduction to the 'new' topic of strategic planning in public relations – a subject that is often referred to by PR people but rarely explained. The aim is to give you some useful tips that will improve your work, whether you are an experienced PR practitioner or new to the business. In addition, and perhaps most ambitiously, the objective is to give you the basis for a whole new approach to the way you conduct public relations, an approach that is fact-based and scientific and therefore contradictory of the popular image of PR as being shallow, 'fluffy' and superficial.

On the other hand, this is not – for the record – one of those guides that teach you how to 'do' PR. There have been a number of other publications that have provided an overview of the discipline and this isn't one of them. It doesn't, for example, explain how to speak to the media. However, it does cover how to determine which media you should be speaking to in the first place, and which messages you should be communicating. These are fundamental points to address before you let yourself loose on the world's press. Of course, while this may seem sensible, it is in reality a very radical point of view. Traditionally in public relations the newest (and often the youngest) practitioners are the ones most likely to have the greatest dealings with the media and the ones least likely to have the slightest inkling about planning. This is probably because they're the ones who are bravest and least embarrassed about pitching a weak idea to some hard-nosed journalist but maybe that idea could be better, or maybe it's being aimed at the wrong journalist. Therefore, logic suggests that planning should come first. So why does it usually come last in the order of learned skills?

If your aim is to learn how to 'do' PR from scratch then the logical approach would be to stick with this Report and discover how to plan your campaigns before you implement them.

However, that said, if you are experienced in public relations and well established in your career – either in an agency or in-house in a company or organisation – then it is you who this Report is really intended for, because it is you who potentially has the most to gain. The advice, guidance and processes we will examine will hopefully give you a different perspective on your job and should significantly change the way you develop and implement a PR programme, helping you to deliver far better results.

In writing this Report the intention has been to avoid the academic approach and produce a practical guide that suggests techniques and approaches which you can actually go out and try yourself. It really should make a difference in your day-to-day work but, hopefully, it will also set you thinking as well. It doesn't set out the best way, or the single, definitive way to plan your PR campaigns, the only claim is that it presents a *better* way. (Better than what? Better than the approach still most frequently taken in the PR industry.) But there is always a better way still. It only requires somebody to think of it. Maybe you will be the one to think of it and find the *even* better way.

What does strategic planning actually mean?

There are various ways to define planning. Sometimes when people bandy the word about they really mean *media* planning – the process of selecting the best media for the communications task. That is certainly part of PR planning – and indeed we will examine it as a subject later on – but it is a very narrow way of looking at what should be a much more far-reaching discipline.

At the other end of the scale, the broadest definition of planning comes from the Oxford English Dictionary:

> '**plan** *n. & v.* formulated or organised method by which a thing is to be done… way of proceeding…'

Of course, this means that planning is something we all do all of the time. We plan our finances and we plan our summer holidays; all we need to do is apply that organised approach (and that level of effort) to planning our PR strategies.

But what is a strategy? It is a plan – a smart, clever one naturally – but a plan nonetheless. So strictly speaking the term 'strategic planning' is unnecessarily repetitive and yet it has a nuance about it that prevents the word being dropped. Strategy is a good thing. In business we all strive to be 'more strategic'. Being 'unstrategic' is a bad thing – almost as bad as being 'off strategy'.

Why does the word 'strategy' carry so much weight? It actually stems from its original definition for which we need to refer again to the dictionary:

> '**strategy** *n.* generalship, the art of war, (lit. or fig.); management of an army or armies in a campaign, art of so moving or disposing troops or ships or aircraft as to impose upon the enemy the place and time and conditions for fighting preferred by oneself; instance of, or plan formed according to this…'

A strategy is no mere plan, it's big-picture stuff – it's moving whole armies about, it's the map of Europe with great arrows sweeping across it. This is in contrast to the thing that it is most often confused with, the tactics, which in military terms are the local actions – the battle to take a bridge, say – which contribute to the big picture, the strategy.

Without a strategy the tactics are pretty futile. What is the point of winning the battle if it doesn't contribute towards winning the war? Yet, in PR terms, I'm sure many of us have seen such a futile, purely tactical approach to communications – for example, the mountain of press cuttings that have been generated with no other purpose than to generate media coverage. But did the cuttings get across what needed to be communicated? Did they communicate with the right people? Were they in the right media? Was this the best way of achieving our objectives and were there any objectives, anyway?

Objectives are the other thing that strategy often tends to be confused with:

> '**objective** *n.* point towards which the advance of troops is directed… point or thing aimed at…'

So, in other words, the objective is what we want to achieve and the strategy is the plan for how we will achieve it. The tactics form the detail of how the strategy might be enacted, and the one missing component is how we will know when our objectives have been met (or, often, how far they have been met when time or resources run out). This last point – evaluation – completes the life cycle of a process that will be fully explored over the following chapters.

The origins of strategic planning in public relations

Strategic planning in PR has developed out of the advertising industry. As a form of communication, advertising has been operating at a sophisticated level for more than a century. It is the means by which many great brands – the Coca-Colas, McDonalds, Persils and Kit Kats of this world – have convinced us to make room for them in our lives, to spend our hard earned money on them and to regard them as things we can't do without. But more than that, they've entwined themselves inextricably into our culture. Just think of the popular image of Santa Claus – it isn't a coincidence that he is dressed in the red and white colours of Coca-Cola. His appearance is entirely an early 20th Century advertising image for the soft drink brand.

What is most impressive about this is that it was largely achieved by intuition. Nobody *knew* what would strike a chord with people and what would be a hit, they could only have a guess at it. It is amazing to think that throughout most of its history the advertising industry has operated on the basis of guesswork and intuition at its heart.

However, by the 1960s when advertising had become a multi-million dollar global industry, people began to think that maybe there could be a way of improving upon this high-risk, hit-or-miss approach and that's when planning was born. The agencies appointed account planners who were charged with replacing intuition with insight, gaining understanding of consumers and how advertising could connect with them.

Now every agency worth its salt has specialist planners working alongside the creative department and the account handlers, and the planning process has become increasingly scientific with a whole range of sophisticated research tools available.

Meanwhile, the PR industry was developing. Although it was much younger, and had smaller budgets to play with and was, perhaps a little harder to define, it was growing at a fast rate and, at least on the agency side, it tended to model itself on its older advertising sister, with, for example, 'account directors' and 'account reviews' and 'pitches' for new business.

It was therefore probably inevitable that by the 1990s PR agencies would start to follow ad agencies in appointing planners. So far there are only a handful, mainly within the larger agencies, and most are actually drawn from the advertising industry, although there are a few who are 'home grown'. Their aim, again, is to start to bring knowledge and insight to an industry that has hitherto largely worked on the basis of intuition and 'gut feel'.

The difference is that we're not yet at the stage – if we'll ever reach it – of having separate account handlers, creatives and planners within PR agencies along the advertising line. It is still the case that most PR executives in agencies and certainly within in-house PR departments, are expected to be able to embrace all elements of the job. The only problem is that it's the planning side that often tends to be neglected.

A few years ago Shandwick International commissioned some research into how companies in Britain perceive public relations and the people who conduct it.[1] It found that the most common criticisms of PR practitioners tended to relate to planning issues. The respondents – senior management in leading corporations – described 'a lack of understanding of my business' and 'insufficient strategic insight or advice'.

It must be said that these same people are likely to be familiar with, and now probably take for granted, the planning function within advertising agencies, so any lack of it in their public relations advisers must appear as a huge, obvious omission.

There is some irony in the fact that the PR industry is tending to suffer from an image problem. All too often it is perceived as flashy, insincere and insubstantial, with words like 'fluff', 'spin' and 'puffery' used in association with it. If that is going to change, it needs to become more substantial, replacing the thin veneer with something more solid, the gut feel with hard facts, the assumptions with sound evidence – and all of that can only come with planning.

The benefits of PR planning

So what can planning do for you? Well, for a start, it presents clearly thought through arguments for a campaign proposal, backed by evidence. It is therefore harder for someone – your client, the board, whoever holds the purse strings – to argue with your proposal.

Planning provides more exciting and radical strategies because no situation and no brief are taken at just face value – they are examined from all angles, they are investigated, and they are thought about. Planning also encourages people to view PR as a more cerebral discipline, more than just sending out a press release, more than just 'fluff' or 'spin'. This, in turn, can create opportunities for PR to take a more fundamental role in the decision making and running of organisations.

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[1] '*What Clients Really Think*', a research study commissioned by Shandwick International and conducted by Visionpoint, 1997/98.

The strategic planning process

STAGE 1: UNDERSTANDING THE SUBJECT

STAGE 2: UNDERSTANDING THE AUDIENCE

STAGE 3: REQUIRED RESPONSES

STAGE 4: PR OBJECTIVES

STAGE 5: DEFINING THE STRATEGY

chapter **2**

Chapter 2:
The strategic planning process

Strategic planning is, at its heart, good common sense. It is the collection of information – the hard facts to replace the gut feel – and then it's the analysis of that information in order to obtain the insight and understanding to help you prepare your plan.

The problem often comes when all the information has been collected and there is just too much to make sense of in any coherent way. The need, therefore, is to break down the collection and analysis of information into bite-sized chunks and create an ordered process to be followed methodically, stage by stage.

Following a step-by-step process means that you have a series of manageable tasks rather than something to boggle the mind, and by strictly sticking to each stage of the process there is less likelihood that you'll miss something essential. On occasion you will inevitably give in to the temptation to rush off in pursuit of some vague hunch, but if you have to return to the process there is less of a danger of getting stuck in a blind alley.

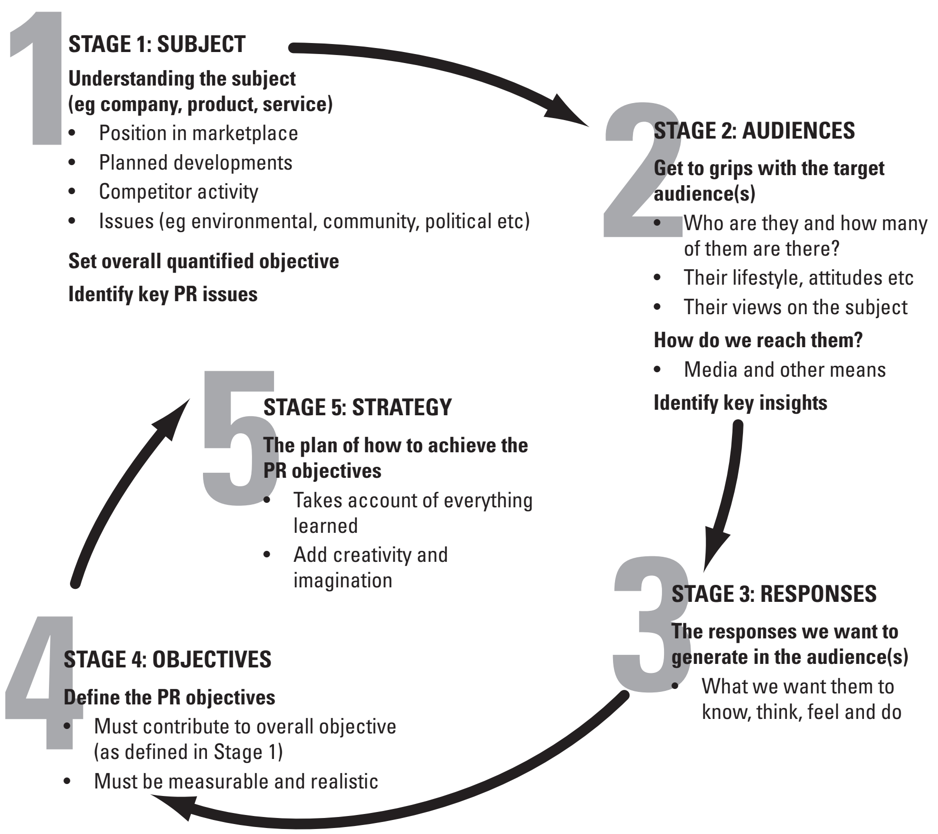


Figure 1: The five stage strategic planning process

Stage 1: Understanding the subject

This is where you start by getting to grips with the subject of your eventual PR campaign – the company, organisation, product or service – whatever it may be.

The sorts of areas you need to investigate are:

- It's position in the marketplace – for example whether sales are rising or falling, their market share etc.
- Any planned developments – perhaps product launches, range extensions, factory closures etc.
- Competitor activity – who the competitors are and what they're up to.
- Any issues surrounding the organisation – such as environmental, community, political etc.

Don't be too narrow in your perspective. For example, if the subject of your campaign is to be a specific product – say, a new brand launch – don't focus only on that product. It will be important to understand the company that is producing it, its size, history and ethos, together with the other products it produces and how they've been marketed. If the company hasn't been doing well an awful lot may be riding on that product launch. There may be political pressure within the company for that brand to make a quick return, if so, you need to know about it, as this would have great bearing on your PR plan. However, it's the sort of point that people don't always volunteer when they're briefing you, so you need to root it out in your investigations.

There are two crucial things that you need to end up with in this stage of the process. Firstly, some overall quantifiable business objective – perhaps X% sales increase, X% market share growth, X pence rise in the share price. It is unlikely that this will be your specific PR objective – you will define that later – but it is the context for your campaign. Everything you do with public relations must play its part in contributing to the overall objective, and as you work your way through the planning process you will need to keep that overall objective in mind. Keep asking yourself, for example: 'Is this likely to contribute to the X% market share growth?'

The overall objective may not necessarily be quantifiable, but it is far more helpful to you if a number is attached because the scale of the task will be clearer and it will be easier to recognise whether you've achieved it or not.

The second crucial element that you need to end up with from Stage 1 is a set of key issues that are relevant to the achievement of the overall objectives and also relevant to public relations. In analysing all the information you'll have gathered at this stage, you will have found many interesting things but you will need to begin to filter them out and focus only on those main points that you really need to think about in putting together your PR campaign.

Stage 2: Understanding the audience

Next you will need to get to grips with the target audience. Who are they, for a start? Hopefully nobody is aiming their PR campaigns at the entire population of the UK any longer. But if you are, please try this simple exercise. Take your PR budget and divide it by 60 million in order to find out how much you'll be spending per person on your communications. How successful do you think it is likely to be? Isn't it a waste of money, anyway, when you don't even need to try to reach a very large proportion of those people?

The reality is that your message will only be relevant to a proportion of the population. You only really want to communicate with those who you might potentially be able to influence. Furthermore, it may be enough to influence only a proportion of them in order to achieve the overall objective.

For example, if your overall objective is to increase sales of a particular product, in truth, it may only require a few thousand new customers to buy the product in order to meet the growth target. The ideal, therefore, would be to concentrate all resources on talking to those few thousand people who are most likely to listen and respond to your messages.

Example: A General Election

But what about messages that are ostensibly aimed at the entire population? Take, for example, the exhortations of a major political party for the population to vote for them in a general election. They are aimed at everyone, surely? Well, not at under-18s, for a start, and there is probably little point in aiming them at the hardened loyalists of competitor parties. Equally, there is probably little point in aiming them at hardened loyalists of your own party who will vote for you anyway. It is far more productive to focus on those people who haven't made up their minds yet on how they will vote or who have the potential to change their minds – the floating voters. So already we've narrowed down the target audience from 60 million. But maybe we could go further. If one of your big vote-winning policies is, say, to crack down on car theft, then communication about that would be best aimed at car owners.

The idea is that you whittle down the population until you reach the target audience that is most applicable for your message. That is, of course, easier said than done, but there are tools to help you get closer and closer to hitting that bullseye of communicating only with the right people.

Developing this process further, it can often be helpful to segment your audience into different groups who each have certain things in common, certain lifestyle attributes, for example, or certain income levels. You can then tailor your messages or means of communication to each of those segments to ensure greater relevance to your audience.

Relevance is at the heart of the issue – you only want to communicate with people who are relevant to you and your objectives, and at the same time you want to make sure that your communications are relevant to them. This means that as well as making efforts to identify and segment particular target audiences, you then need to understand them and find out what makes them tick – how they live their lives, what their attitudes are and what they think of your company, product or service. Crucially you also need to look at how to reach them – the best media for delivery of the audience and, possibly, any other non-media means that may be appropriate. Because this is at the heart of the planning process we'll return to it as a theme later.

As with Stage 1 we will hopefully have collected a lot of information and to make sense of it we need to ultimately identify the key insights that relate to PR communications and discard the rest.

Stage 3: Required responses

Now that we know and understand our target audience, the next, very fundamental stage is to decide how we want them to respond when we communicate with them – what we want them to know, think, feel and do.

- Knowing or awareness – what in factual terms do you want the target audience to know about the subject?
- Thinking or believing – what broader attributes do you want them to believe about the product?
- Feeling – how do you want the audience to feel about the product in more emotional terms?
- Doing or acting – what do you want the audience to ultimately do?

Example: Sugar

Take, as a hypothetical example, sugar. Let's suppose we had to develop a generic PR campaign to defend sugar against the healthy eating trend that has been hitting sales. What responses might we want to prompt in our consumer audience?

- **Knowing:** *'Sugar is a naturally occurring sweetener that is only 19 calories a teaspoon and can give you energy.'*
- **Thinking/believing:** *'Sugar is more natural than artificial sweeteners and it's not as fattening as I think. It can be beneficial as part of a balanced diet.'*
- **Feeling:** *'Sugar gives my food and drink delicious sweetness and natural goodness.'*
- **Doing:** *'I'm going to use sugar in my food and drink,'* or, perhaps, *'I'm going to find out more about how I can use sugar as part of a healthy, balanced diet.'*

You can turn these required responses into your key messages, which in turn lead on to your PR objectives.

But why can't we just decide on our messages without going through this laborious stage? By looking at the responses we need to generate we keep our focus on the target audience and not on ourselves. So, rather than concentrating on what we *want* to say, we can identify what we *need* to say in order to generate the right responses in our target audience.

Stage 4: PR objectives

The big question with PR objectives is why do we need them – why do we need a set of objectives that are different to the overall objective defined in Stage 1?

Firstly, the overall objective is not specific enough to the PR function, therefore we need to define precisely what we need to achieve in PR terms in order to achieve the overall objective.

Secondly, it is highly unlikely that we could measure and evaluate PR in terms of the overall objective. For example, if, in Stage 1, we decided that we needed to increase market share by X%, how could we ultimately isolate PR's contribution to that achievement from the other marketing activity that may have been carried out? We couldn't, and, indeed, it may not be possible to isolate the effect of any of the marketing activity from other external factors such as the weather, or the fact that your competitor just put their prices up.

We therefore need to define specific PR objectives that take account of the overall objective and are measurable. They also need to be realistic. A frequent mistake is to produce a long list of umpteen objectives or set yourself the task of doing something that will ultimately be a nightmare to achieve. If you're doing the planning for a campaign that someone else will have to execute, it is best if they have the opportunity to comment on the challenges you are setting them.

In other words, no matter how much creativity and imagination you are employing elsewhere in your campaign proposal, or no matter how much salesmanship you've been using, writing the PR objectives is a time for boring level headedness, restraint and good sense.

A sensible approach to defining the PR objectives is to go back to your required responses and turn those into a set of key messages. Your PR objective, therefore, can be to communicate those key messages. By doing this you will be contributing to the overall objectives, and it will be relatively easy to evaluate – simply measuring the volume of media coverage achieved for each message will indicate the level of success you've had at communicating them.

Example: Sugar

Therefore, returning to our sugar example, we can define our PR objectives based on the required responses.

Communicate the following key messages to the target audience:

- Sugar is natural
- Sugar is not as fattening as you might think
- Sugar can be physically beneficial as part of a healthy, balanced diet
- Sugar makes food and drink tasty and more enjoyable.

As an objective, this is devoid of any razzmatazz, salesmanship or clever marketing speak and it is a clear, realistic and measurable statement of what it is you are setting out to achieve. If you wished, you could go further and add some targets for the amount of media coverage you expected to achieve for each message. That would clarify, even further, what a successful campaign would be like.

Stage 5: Defining the strategy

Now, at last, we can develop the strategy – our plan for how we will achieve the PR objectives.

We should take account of everything we've learned – the key issues surrounding the subject and our main insights about the target audience and how to reach them. We also need to add an element of imagination and creativity, the hardest part to control.

Because creativity is not always something that can be turned on like a tap the strategy should remain fluid for a time, until you are completely satisfied with it. Be prepared to revise it and if possible debate it with colleagues. As long as any subsequent changes match the facts that you've collected there is no problem with changing the strategy.

However, that said, if the planning process has gone well you will find that the strategy has naturally developed out of the other stages. All that remains is to write it into a coherent plan. Ideally, for anyone reading your planning document for the first time, your strategy will not come as a surprise because all the information and evidence should point naturally towards it.

Now comes the creative process, the brainstorming or whatever approach you use to develop the ideas or tactics to put your strategy into action. Be open to potentially tweaking your strategy in the light of some pertinent thought that comes out of the creative process. Then, as the ideas are investigated and put into practice, you need to ensure they stay 'on strategy' and don't drift off into something that was never intended just because someone thinks it's a good idea. If it is a good idea, where's the evidence to support it?

Even then the planner's role doesn't end. As the campaign runs – is it working? Is an amendment or even complete rethink of the plan required? And as you analyse the evaluation, what lessons can be learned that could improve this campaign or future activity?

While the focus of strategic planning is on producing the strategy, planning is a continuous cycle of collecting, analysing and refining.

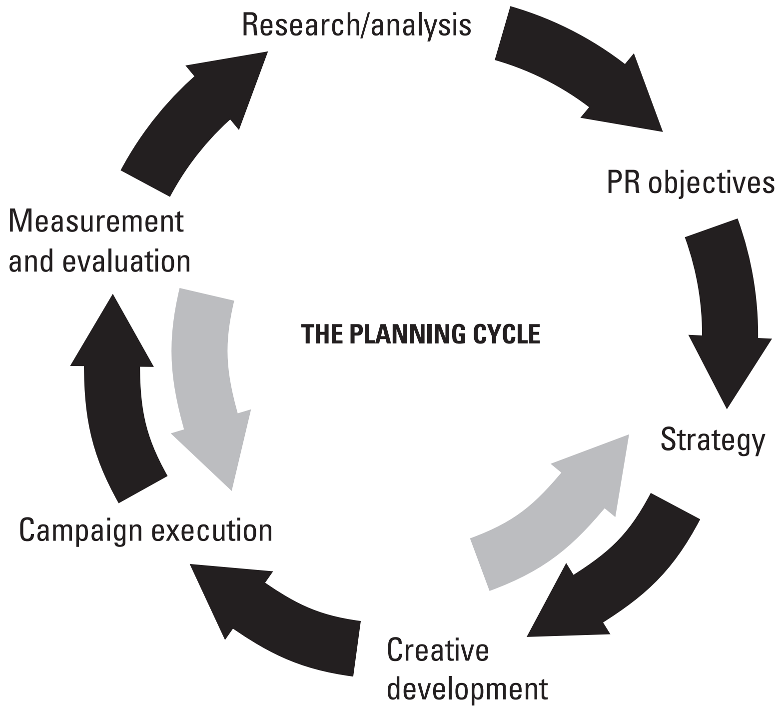


Figure 2: The planning cycle

Getting out what you put in

INFORMATION SOURCES FOR THE SUBJECT

TOOLS TO GIVE INSIGHT INTO THE AUDIENCE

chapter **3**

Chapter 3: Getting out what you put in

The quality of what you put into the strategic planning process will govern the quality of what comes out. Rubbish in, rubbish out, applies as much to the information you gather as to the amount of thought and effort you employ. Let's look, therefore, at some of the information sources available to you for the first two data-gathering stages of the process.

Information sources for the subject

The brief

If you have received one, a brief is an obvious source of information. What may be less obvious, however, is how to make full use of it.

You cannot count on the people briefing you being able to express themselves very well. They may overstate a minor point and understate something that is very important. At the outset the brief should be fully read through two or three times, and you need to look for the nuance or the throw-away line that may turn out to be crucially important.

You then need to follow up with questions aimed at the author of the brief in order to clarify anything that is vague and to extract as much information as is available. While this may seem common sense, some people are often reluctant to fully question their client or new business prospect.

As the planning process progresses, the brief should be read through again at regular intervals to ensure that you aren't drifting away from the original requirements. The point is that if you wish to challenge the brief you can do so, provided you put forward a clear, coherent argument. What you don't want to do is end up off-brief by accident.

The press

The press can be a valuable source of information and insight about a company or organisation and its competitors. The trade press covering the relevant sector may well have published a round-up feature about the market that could give you a good overview. Also trade journalists can have many years of experience writing about a particular industry and are often happy to share that knowledge with interested people who call them – as long as you don't phone on press day! In addition, national newspapers, particularly the broadsheets, and the marketing press such as *Marketing* or *Marketing Week* may well have published news items that may be relevant if you can go back through past issues.

Online databases

Subscription-based online information services such as *Lexis-Nexis* or *Profound* can make the hunt through past press coverage a lot easier. They also offer access to a range of other useful information such as news agency reports, market research and stockbroker reports.

In addition, there are other online systems that can provide a range of useful information. For example *Foresight* is a forward planning tool detailing future events under various categories, allowing you to check, say, whether there are any conflicting events scheduled for the day of your planned press conference or to look for potential sponsorship opportunities. *Future Events News Service* – more commonly known as *FENS* – looks ahead at political, business, legal and arts activities over the next 12 to 18 months.

There are also a number of more specialist online information systems such as *Fashion Monitor* covering the fashion industry and *Entertainment News* covering showbusiness.

Trade associations

As with the trade press, trade associations can be a useful source of an expert overview of a particular market. Although they try to give the impression of having a large infrastructure, very often such organisations operate on a day-to-day basis with just one or two people working out of a small office. Provided you catch them at the right time they are usually quite helpful and happy to answer your questions.

Market reports

Organisations such as *Mintel*, *Euromonitor* and *Keynote* publish market reports that examine in detail the current status, key players, trends and likely developments of different markets. These reports can be quite pricey to buy but they can be accessed for free at many public reference libraries. The one warning about them is that they can get out-of-date quite quickly, so if the last report on your market was published a few years ago it is wise to treat it with caution.

Libraries

While public libraries can be a very economical way of accessing reports and other published works, there are also a number of privately run libraries that can be helpful to anyone conducting desk research, although most of them do charge for their services.

Many media-run information services that were created to provide desk research for journalists are now available externally. For example, the *Financial Times* and the trade publication *The Grocer* offer access to their archives, while the *BBC Information and Archives Commercial Unit* can search by topic through 25 million press cuttings spanning 50 years, as well as providing access to commercial online databases, government and parliamentary research and even the *BBC Pronunciation Unit*.

Companies who are members of organisations such as the *Confederation of British Industry* or *Institute of Directors (IOD)* have access to their libraries. IoD members, for example, are allowed 25 free half-hour requests to their Business Information Service each year. This provides use of the business library as well as access to company information and online databases.

The Internet

The World Wide Web is a great source of free information and anyone involved in desk research should spend time 'surfing the net' without feeling guilty that they're wasting time. The great art with the Internet is finding what you're looking for, and that takes experience.

When researching information as part of Stage 1 of the planning process it is worth starting with the website for the company or organisation that is the subject of the exercise, together with competitors' sites. It is also valuable to try to find out what else is out there about the subject, particularly what negative issues may be bubbling beneath the surface. Use of a search engine like *Google.com* can be a good starting point. However, you will not have the time to conduct a definitive search of what all the online newsgroups may be saying about the subject so if that's required, you may need to employ a specialist monitoring company such as *CyberAlert* or *Infonic*.

Beyond that, there is a lot of other useful information to be found on the Web. For example, many of the market report publishers mentioned earlier have websites detailing contents of currently available reports (www.keynote.co.uk also reproduces executive summaries), while the *Office for National Statistics* (www.statistics.gov.uk) and many government departments publish a wealth of useful data.

Personal observations

Your own observations are also a valuable part of the information gathering. You may be doing desk research but you would be unwise to remain glued to your desk. Get out and see for yourself how the subject works in the real world. For example, if it is a grocery brand go to a range of different sized supermarkets and see how the product is displayed and how customers tend to be behaving when they get to that section. If the subject has a chain of outlets, go and look at as many branches as possible. You may find that, depending on the type of location, one set of branches may appeal to a certain audience while another set may appeal to a completely different sort. This would suggest some form of audience segmentation in your communications.

Of course much of this might need to be checked out further – for example by commissioning market research – but the initial insights from your observations can give you an idea of routes to explore.

SWOT analysis

Although not strictly an information source at all, the SWOT analysis can be a simple and useful tool in marshalling your thoughts. By listing everything you can think of relating to the subject under each of the four headings – Strengths, Weaknesses, Opportunities and Threats – you can make sure that you take full advantage of what you know about the subject.

If your knowledge isn't adequate enough to complete the SWOT analysis yourself, perhaps you can persuade the person who briefed you or some other expert (the person at the trade association, maybe) to fill it in.

The completed SWOT analysis will help you define the key issues facing the subject.

Tools to give insight into the audience

The next stage in the planning process is where we seek to understand the target audience. There are a number of tools available to assist with this.

Audience research

The only way of understanding what makes your target audience tick is through research. The next chapter will examine how to go about commissioning audience research, but it is also worth investigating whether there is any existing research that might help you.

Many large companies have their own research departments. They are usually extremely adept at commissioning research and filing and retrieving it, but poor at sharing the findings around the company. It is definitely worth getting to know the staff in the research department and having a regular rummage through their files. It is also helpful if you can seek to have an input in any future research that may be commissioned. It wouldn't make much difference to the cost to add one or two questions for the PR department or agency, but it could give you a valuable insight into how to reach your audience or perhaps a useful titbit for your next press release.

As well as existing research available in-house, many of the major market research companies are prepared to sell you copies of old reports at a relatively modest cost. It is also worth visiting their websites because many of them provide a free searchable archive allowing you to pull up summaries or press releases of most of their previous research (such as at www.mori.com or www.nop.co.uk).

Target Group Index

TGI is a wonderful product of huge potential value to the work of PR people but, sadly, is hardly ever used by them. Unfortunately the annual subscription is very expensive, but it can be worth it. If you work in an in-house PR department maybe your company already subscribes to it (try the research department again) or maybe your advertising agency has it.

Produced by the British Market Research Bureau, *TGI* is an on-going piece of research based on 24,000 self-completion questionnaires distributed nationally. It identifies heavy, medium, light and non-users of a vast range of products and then cross references them with a range of factors – for example, age, sex and socio-economic group, income, level of education, media consumption, and, in an optional add-on, lifestyle factors.

This means that *TGI* can be very helpful in identifying your target audience and providing a detailed picture of what they're like. For example, if the subject of the planning process was a shampoo brand, we could look at heavy users of shampoo and discover the age and sex they're most likely to be, whether they're married or single, their level of income, the TV programmes they watch, magazines they read, whether they go to the cinema very much, their hobbies and pastimes and the other products they may use a lot.

So you can use it to determine not only which media to use but whether that cinema sampling programme, say, or the golf sponsorship idea, are likely to be effective ways of reaching your target audience.

Incidentally, *TGI* isn't the only tool to help identify the best media to use. Others are detailed in Chapter 7, which examines the specific discipline of media planning.

Media audits

Many people working in PR will have conducted a media audit before and will have found it a useful tool. In fact, it is a form of do-it-yourself audience research and as such, effort should be made to make it as scientifically sound as possible. The better the methodology used, the better the evidence it will give you.

The media, of course, are a crucial audience for the PR practitioner – an intermediary audience that lies between the PR practitioner and the ultimate target audience. They can either facilitate communications or block them, so it is important to understand what makes them tick as much as anyone else.

Hopefully, if we deal with the media everyday we should already have a good understanding of them but the formalised approach of conducting your own audit or survey can still prove helpful.

Avoid the temptation to just have an informal chat with a few of the journalists you are most 'matey' with and adopt a more rigorous approach. Prepare a questionnaire to ensure every respondent is asked the same questions. The majority of the questions should be multiple choice to make the process of analysing the results easier, although do also seek comments as well – a few juicy quotes can be useful to include in any proposal. The sample size – in other words, the number of journalists interviewed – should be as large as possible. Try and get some colleagues to assist you and make the task more manageable. Better still, employ a research company to do a thorough job.

What questions should you ask? What they think of the subject, for a start – in terms of their perceptions as members of the public as well as journalists. You need to assess how the journalists rate the service they are currently getting from the company or organisation – the quality of the press releases and so on. In addition, ask how they perceive the subject in more objective terms – for example, whether they'd be likely to write positively, negatively or neutrally about them. You also need to know the same about the competitors, and, perhaps most importantly of all, what the journalists would ideally like in terms of actions and service in the future.

Essentially, at the end of this exercise, you need to be able to determine what you need to maximise this route to your target audience.

Evaluation

Measurement and evaluation will be fully covered in Chapter 6. However, they are included here because of the need to see them as a beneficial tool in the planning process.

All too often evaluation is only seen as a justification for the PR spend and an answer to the question:'Was it worth it?' It is inevitable that this will be an important question to answer, but it is not the only one. Evaluation should also seek some lessons to be learned and answer the question:'How can we make PR work better in the future?' In that way it becomes a valuable information tool and an important element in maintaining the continuous planning cycle.

Understanding your audience

AUDIENCE GROUPINGS

QUALITATIVE RESEARCH

QUANTITATIVE RESEARCH

INFORMAL VOX POPS

chapter **4**

Chapter 4: Understanding your audience

'Joe Public' is dead. The idea that one imagined man can represent all people is now ridiculous. The concept of the 'general public' as a single amorphous mass with common traits and common interests is now hopelessly out-of-date – although the myth still lives on.

In the past people did have common experiences – the War, the power cuts and uncollected rubbish of the '70s – and they had a far smaller choice of media. When there were only two TV channels in the UK, a huge proportion of the population tuned into a major new TV programme and talked about it at work or school or in the pub the next day. In the 1970s for example, it seemed like the entire nation wanted to know who shot JR. In contrast, when Channel 4's recent, celebrated fly-on-the-wall show, 'Big Brother' was reported to have 'taken the nation by storm' with 'everybody talking about it', the programme had in fact, at its peak, attracted 6 million viewers, just 10% of the population. The other 90% were doing something else.

When people had limited choices in what they could watch, what they could read, and how they could spend their time, many of them did do the same things and talked about the same things and they probably ended up having similar attitudes as a result.

But today we are all individuals with choices. We like being individuals, expect to be treated as such and are wary of any attempt to be dealt with collectively. We don't watch the same TV programmes, even within families many no longer watch TV together. We each select one of 300 TV channels to reflect our individual interests and watch it on our own individual TVs. Many families don't eat meals together but rush in from their busy, individual lives and heat up in the microwave an individual portion of their preferred snack, chosen to meet their individual tastes.

We each have our own individual hobbies or pastimes and we like to read a magazine that covers them, chosen from a range of thousands of titles. And now we're also starting to surf the Internet, not because we're interested in computers particularly but because, with a choice of millions of websites, there's lots on offer there to reflect our individual interests.

'Individuality' and 'choice' are the watchwords for the new century. They make life harder for the PR planner – or make the need for us all the greater.

So, we can't communicate with the 'general public' any more. In an ideal world we would communicate with each person individually. However, in reality, of course, that's not cost-effective so we need to find ways to group people together whilst recognising a degree of their individuality. There are a number of ways of doing this.

Audience groupings

The most familiar audience groupings are the socio-economic grades as defined by the National Readership Survey:

SOCIAL GRADE	SOCIAL STATUS	OCCUPATION
A	Upper middle class	Higher managerial, administrative or professional
B	Middle class	Intermediate managerial, administrative or professional
C1	Lower middle class	Supervisory or clerical and professional, junior managerial or administrative
C2	Skilled working class	Skilled manual workers
D	Working class	Semi and unskilled manual workers
E	Those at lowest level of subsistence	State pensioners or widow(er)s (no other earner), casual or lowest grade workers

Figure 3: Socio-economic grades (National Readership Survey)

These have proved very helpful over the years, particularly as the readerships of leading newspapers and magazines can be divided between the social grades and precisely quantified. They have also become very well-known – even ordinary consumers have started bandying them around. The problem is that we tend to inject a subtler nuance into them than actually exists, which is a result of the intrinsic limitations of the system.

As soon as you start looking at the definitions you start asking questions. If state pensioners are defined as 'E', how do we define people on private pensions who may have a substantial disposable income? How do we take account of C2 skilled manual workers who may have higher salaries than many B professionals? How do you address a C1 junior manager who may have been brought up in an A household and who has therefore inherited more upper middle class attitudes, tastes and product preferences?

When these limitations were recognised other classification systems were devised. One of the most notable is ACORN produced by CACI. This divides people into six categories that are then subdivided into 17 groups.

CATEGORY	GROUP
A: Thriving	1 Wealthy achievers, suburban areas 2 Affluent greys, rural communities 3 Prosperous pensioners, retirement areas
B: Expanding	4 Affluent executives, family areas 5 Well-off workers, family areas
C: Rising	6 Affluent urbanites, town and city areas 7 Prosperous professionals, metropolitan areas 8 Better-off executives, inner-city areas
D: Settling	9 Comfortable middle agers, mature home owning areas 10 Skilled workers, home owning areas
E: Aspiring	11 New home owners, mature communities 12 White collar workers, better-off multi-ethnic areas
F: Striving	13 Older people, less prosperous areas 14 Council estate residents, better-off homes 15 Council estate residents, high unemployment 16 Council estate residents, greatest hardship 17 People in multi-ethnic, low-income areas

Figure 4: The Acorn classification system (CACI)

The 17 ACORN groups then divide into a further 54 types, providing greater subtlety and sophistication to audience classification and encouraging more focus in communications.

Of course, many of us don't necessarily need to be able to classify the entire population, we only need to define our audiences and learn more about them and in achieving this it often takes only a little titbit of information to prompt an area of investigation.

For example, a press release from the Office for National Statistics summarising the 1998-99 Survey of English Housing observed that young women tend to start living independently earlier than young men. It transpired that half of young women are living independently of their parents by the age of 20 or 21. In contrast, 74% of young men are still at home by the age of 25, and 12% still haven't flown the nest by the time they hit 30. Who can blame them? They don't have to shop at the supermarket, they don't have to cook, they don't have to clean – mum does it all. And think of the money they're saving – money that can be spent on other things.

Now if you're doing PR for a product aimed at young men, this is highly interesting. At the very least it suggests a segmented target audience, with one segment being these young blokes still tied to their mothers' apron strings. But to take this further requires more research, and carrying out your own tailored audience research is the most important tool in understanding a target audience.

Qualitative research

PR people often shy away from audience research, assuming that it is prohibitively expensive for a discipline with strictly limited resources. 'It'd be different if we had advertising-style budgets,' is often the cry. Well research isn't always as expensive as people believe and qualitative work – such as focus groups – can be very affordable.

As the name suggests this approach offers quality rather than quantity. In other words, instead of interviewing hundreds or thousands of people you'll only be speaking to a handful, but you'll have time to explore issues in-depth with them.

Qualitative research can take the form of in-depth telephone or face-to-face interviews or the focus group, the much-maligned favoured tool of politicians. Most of the criticism that has been levelled against focus groups is completely unjustified and as a means of gaining insight and understanding of your target audience, they can't be matched – whether you work in marketing communications, corporate affairs or politics.

The way focus groups work is that you recruit a sample of around eight or nine of your target audience, put them together in a room with a moderator and have a detailed discussion with them, exploring their attitudes, their perceptions of the subject, and even testing various potential strategies with them. There are usually refreshments for the participants and most people love finding themselves in a situation where they can express their opinions on a topic to their heart's content in an environment where others are actually interested in what they've got to say. As a result there is no problem in keeping the respondents together for one to two hours so there's ample time to fully explore your subject.

You can hire a research company to carry out the focus groups and the costs can be relatively modest, although the main variable is the complexity of recruiting the sample. If, say, they are 25 to 35 year old, BC1 mums, they would be fairly straightforward to recruit, but if, on the other hand, they had to be frequent business travellers who are mobile phone users and who use a computer to surf the Internet, that might be a bit more complicated, and therefore more expensive, to recruit.

The other factor in keeping costs down is curbing the research company's desire to hire a viewing facility. This usually provides a large, comfortable room for the focus group and a second room that can accommodate a fairly large audience watching the proceedings through a two-way mirror. With the addition of sandwiches and wine for the audience this can be an expensive and often wholly unnecessary extravagance. It is far more economical to hold the session in someone's sitting room and, provided that only one or two of you want to watch, it is normally not disruptive for you to sit discreetly in a corner. The only exceptions to this are when loads of people want to witness the session or if you're working with a very tricky group, such as children, who may be easily put off. Otherwise, keep it simple to keep the costs down, and you'll then find you may be better able to justify use of qualitative research in the future.

Quantitative research

Qualitative research lets you discover the views of your target audience, but, in reality, they are only the opinions of eight or nine of them. Classically, you then need to go on to test those views among a statistically representative sample of between several hundred and several thousand people using quantitative research.

People worried about the cost, often ask what sort of sample size is required for quantitative research. Actually, this is probably the wrong way of looking at it. In the first place the size of the sample will depend on the size of the universe of people in that target audience in the UK. The smaller the universe, the smaller the sample can be in order to deliver quite a large proportion of them.

In the second place, there is always a margin of error on every piece of quantitative research, usually expressed as plus or minus X% – the smaller the sample size, the greater the margin of error. This means that you can do quantitative research with any sample size; it is just a question of deciding what would be an acceptable margin of error.

It is interesting that since the debacle of the 1992 general election when most of the research companies wrongly predicted a victory for Neil Kinnock's Labour Party, many national newspapers now quote the margin of error when publishing political opinion poll results.

Best advice is to always ask the research company to tell you the margin of error and then debate with them the implications of decreasing or increasing your sample size. From your point of view you need to achieve the best balance of cost and accuracy.

The other element that has a major impact on cost is the particular audience you're targeting. Who they are, how difficult they are to identify, together with the quantity and complexity of the questions, will govern how the research will be conducted – whether it is interviews in the street, in people's front rooms, over the telephone or over the Internet.

In addition, there is also the option of taking part in an 'omnibus survey' – simply adding some questions into a piece of research that is already being conducted. Most major research companies carry out omnibus surveys at regular intervals and, at just a few hundred pounds per question, they can be highly cost-effective provided they meet your needs.

Whichever approach is taken, all quantitative research will use a questionnaire with most of the questions having a multiple choice of answers. There isn't really potential to ask more than a handful of open-ended questions, and, anyway, they aren't really the purpose of quantitative research. The whole point is to give quantified results – you need to be able to say that the majority of your target audience (X%) believe such and such. If you want quotes and comments it's the qualitative approach you need, but this way gives you numbers.

Informal vox pops

Sometimes PR people's first foray into conducting audience research for planning purposes is to carry out a 'vox pop' to accompany a proposal. However, while this approach can sometimes be useful it is important to understand that it is not proper scientifically conducted research.

The vox pop – standing for *vox populi* or voice of the people – has traditionally been a favoured approach with journalists. You know the sort of thing, where the TV news reporter is out on the street thrusting a microphone into the face of unsuspecting shoppers and asking their opinion on the Prime Minister's latest announcement on the economy or whatever.

Now PR people frequently adopt the same approach, sending an interviewer out with a video camera to question people about their views of the client's products. As with the journalists' version, if tightly edited this can be a good way of getting watchable, entertaining video footage to illustrate a point. But it is not proper research – the interviewees have not been recruited to represent the specific target audience and the methodology uses neither an in-depth qualitative approach nor a statistically sound quantitative one.

So, by all means use the vox pop to illustrate a proposal but do not pretend it is properly conducted audience research or a particularly convincing piece of evidence to support any assertions you may wish to make.

It is also worth bearing in mind that you could video a focus group and show highlights in a presentation if that's what you want, and you'll benefit from having a more sound and convincing piece of research behind it.

Ensuring creativity lives up to the planning promise

PREPARING A CREATIVE BRIEF

DEVELOPING CREATIVE IDEAS

TURNING CREATIVE CONCEPTS INTO WORKABLE ACTIVITIES

chapter **5**

Chapter 5: Ensuring creativity lives up to the planning promise

The processes and information sources described so far are intended to produce better, more exciting strategies. But what comes next? The strategy is a 'big picture' plan that contains a promise of individual tactical activities to come – activities that should be effective, creative and just as exciting (if not more so). The challenge is to ensure that the activities live up to the promise of the strategy and the planning process.

Strictly speaking, the creative stage isn't part of the planning process at all. At this point the planner's only role is to keep a watchful eye on the tactics as they come together to ensure they don't stray 'off strategy'. However, it would seem unfair to just abandon the development of the campaign at such a critical time. Anyway, as we've seen, most people working in public relations have to cover all disciplines so the practitioner will, of necessity, have to switch from being a planner to a creative person at this point. It seems only reasonable, therefore, to explore the creative stage to some degree, although, as a topic, it is big enough to warrant a book of its own.

Preparing a creative brief

One way that the planner can assist whoever's charged with developing the creative part of the campaign – even if they're one in the same person – is to borrow an idea from advertising and prepare a creative brief.

In an ad agency, the creative brief would be, quite literally, a brief to the creative department. While that would hardly apply in PR, this can still be a useful exercise because it distils on to one sheet of paper exactly what is required of the tactical ideas.

Figure 5 is a suggested layout for a PR creative brief. It is similar to, but differs slightly from, an advertising creative brief. What may be noticeable is how similar it is to the strategic planning process – it follows all stages, albeit in a rearranged order. It is, in fact, a summary of everything that has been discovered and decided in the development of the strategy, pared down to its bare bones. Because of that, preparing a creative brief can be a useful exercise from the planning perspective as well as the creative, encouraging a very focused approach and discouraging any tendency to be distracted by some very interesting fact that is largely irrelevant. Therefore, the strict rule needs to be maintained that the creative brief is kept to one side of A4. Once the rule is broken, the two and a half page creative brief – or even longer – will appear and the whole point will be lost.

So the creative brief is a clear, succinct statement to yourself and to whoever else you are involving in the creative process, of what the tactical ideas need to do. It should be accompanied by a verbal briefing so you have the opportunity to expand on any point or answer any questions.

PR CREATIVE BRIEF

CLIENT: ____________________________ PRODUCT: ____________________________

BUDGET: £ ________________________ TIMING: When is the campaign to run?

BACKGROUND	What is the problem or issue, and what has PR done before and how did it work (if relevant)?
TARGET AUDIENCE	Ideally more than just the socio-economic group but a short description to help you visualise them.
ATTITUDES	Summary of the audience's views or preconceptions.
OBJECTIVES	What must the campaign achieve?
KEY MESSAGE	The main things that you want to persuade the target audience about.
SUPPORT	Is there any evidence to back up or give basis to the key messages?
SOLUTION	The PR strategy, summarised in one sentence.
COMMUNICATIONS ROUTES	Media or other means selected for reaching the audience.
MANDATORIES	Any strictures that the campaign must comply with.

Figure 5: Suggested layout for a PR creative brief

PR CREATIVE BRIEF

CLIENT: Sugar industry consortium   PRODUCT: Generic sugar

BUDGET: £100,000   TIMING: From spring

BACKGROUND	Consumer sales of sugar are falling due to the continuing trend towards healthy eating, which has resulted in sugar being perceived as fattening and unhealthy. These negative perceptions need to be countered in order to slow and ultimately halt the sales decline.
TARGET AUDIENCE	Female main shoppers with children.
ATTITUDES	Audience driven by desire to do their best for their families – give them food that they will enjoy and will be healthy for them. Direct use of sugar by the family perceived as unhealthy therefore discouraged by target audience. They probably work either full or part-time so have little time for baking and making puddings. Note also that consumption of hot beverages is in decline, particularly among the young.
OBJECTIVES	Communicate a role for sugar as part of a healthy, balanced and tasty diet in order to encourage target consumers not to further reduce consumption and purchase.
KEY MESSAGE	• Sugar is natural • Sugar is not as fattening as you might think • Sugar can be beneficial as part of a healthy, balanced diet • Sugar makes food and drink tasty and more enjoyable.
SUPPORT	• Various scientific studies demonstrating the benefits of moderate sugar consumption • Traditional, common-sense attitude that ‘a little of what you fancy does you good’.
SOLUTION	Focus on usage suggestions for sprinkling sugar – simple, tasty, fresh, natural, calorie-counted desserts and cereals using a little sugar – underpinned by news coverage of latest scientific studies into the benefits of moderate sugar consumption.
COMMUNICATIONS ROUTES	Primarily women’s weeklies (eg *Take a Break*, *Bella*, *Woman’s Own*), in-store magazines (eg *M&S*, *Safeway* and *Sainsbury* magazines), TV listings magazines (eg *What’s On TV*, *Sky Customer Magazine*).
MANDATORIES	Approach must be moderate and down-to-earth and should try to avoid inviting criticism that the campaign is encouraging heavy consumption of sugar.

Figure 6: Returning to our hypothetical example of a generic campaign for sugar, how the PR creative brief might look

Developing creative ideas

Now you know what you want (which is arguably the biggest hurdle) the next challenge is how to get it. Although coming up with ideas is not a process-driven exercise – it is about freethinking and inspiration – there is still a need to be methodical about making the circumstances right for creativity.

Making sure you benefit from enough minds is the first challenge. Inevitably there will be fewer people than you would ideally like available to develop ideas for the campaign – maybe a team of just two or three or maybe just you. However, that doesn't mean you can't supplement the team by 'borrowing' people from elsewhere for the very focused task of coming up with the initial ideas in the first place.

Don't feel you should only have experienced PR people trying to think of ideas for your PR campaign. Anybody can be creative. Okay, their suggestions won't necessarily have fully fleshed-out mechanics, but that's not the difficult part, it's having the good ideas in the first place that's the challenge.

In selecting people to take part in your creative session you can use a range of factors:

- They could be representative of the target audience – if, for example, you need to communicate with mothers it is probably a good idea to have a few mums involved in the thinking of ideas
- They could simply be noted for being imaginative
- They should not be too cautious and self-conscious – the last thing you need is someone who is too nervous of looking foolish to make any contribution

Probably the least important factor at this stage is that they are experts in PR.

You may need to 'borrow' people from elsewhere – other departments, your family, from among your friends – and you may need to negotiate, offering to reciprocate by helping them think up new ideas when they next need to do it, perhaps. However you approach it, you need to find around six or seven extra minds.

Some form of brainstorm is probably the best approach, but it is worth going to some trouble with it to make sure it really works. This means that a quickly snatched half hour or hour is not going to be adequate. Think about it: pulling someone away from their desk or whatever other task they're involved in and telling them, 'We've only got half an hour, so be creative, now!' is hardly guaranteed to be fruitful. People need time to warm up, get into the mood and get their minds around the task before they can be creative. Ideally a half-day is required – either a full morning or full afternoon – and occasionally, for a big task, a whole day is recommended.

The next point to consider is where to hold the brainstorm. The best option is to find an environment away from the office. You need to make sure that people aren't popping back to their desks or taking messages and continuing to be distracted by their normal day-to-day jobs. The further away you can get from the normal work environment the more successful you'll be at making people forget their normal jobs and focus on the task in hand. Hiring a hotel meeting room is a good idea or if budgets preclude that, does anyone live near enough to be able to use their living room? If finding a venue outside of the office is out of the question, use a proper meeting room and prepare it beforehand, don't just crowd around someone's desk. If there's a meeting table move it aside and have the participants sit in an informal group. Is there anyway to dress the room with pictures or props that might help inspire people? Consider having unusual refreshments or anything else that will make the experience different from a normal day at work – it all helps free up and stimulate the mind.

Remember, the amount of effort you make is a statement to all participants of how important you regard the task. A lack of effort on your part will prompt a lack of effort from them.

Having prepared your environment you next need to have some warm-ups to help participants relax and get into the right frame of mind. It is also worth doing these again once or twice during the course of the session to give people a break and refresh them.

The following is a choice of warm-ups that you can select from – you don't have to do them all, just one or two.

'Get out of that'

As people gather, ask them each to think of an ordinary, everyday object, to write it down on a piece of paper and to hold it so everyone else can see what their chosen item is. Anything would do – for example, it might be a shoe, an electric iron or a rubber tyre. When everyone has chosen an object, announce a simple challenge based on an adventure scenario that people have to escape from using the object they have chosen. It might be something like this: 'You are on the top floor of a skyscraper that's on fire. How do you get out using only your chosen object?'

After allowing no more than a few seconds for thought, start going around the room asking each person, one by one, to briefly explain their solution. Hopefully, you'll get some pretty wacky answers (like, getting inside the rubber tyre and rolling it down the stairs as a fast way to get past the fire and down to the ground). Don't worry if the answers are pretty silly – the aim of the exercise is to encourage people to feel comfortable about voicing their ideas and not to worry about feeling foolish. It also starts to get people thinking imaginatively about problem solving.

If time permits, it might be worth doing two or three of these escape scenarios.

Word association

Another game that gets everyone warmed up and participating is 'word association'. Start it off yourself by stating a word, any word, but perhaps it could relate in some way to the task that day. As soon as you say it the next person has to quickly say the first thing that comes into their head in relation to your word – with no thinking about it and no 'umming' or 'ahhing'. The next participant has to think of a word that relates to the second person's contribution and so on, until you've been around the entire group. So, if you started with, say, 'shoe', the next person might say 'sock', the next one might respond with 'foot', the next with 'mouth' and so on. In fact, because the game is fast, you can afford to go around a few times – the more the better in helping to break down people's inhibitions about participating.

Brain teasers

A good way of getting the cogs in the mind turning is to challenge the group with brainteasers. These can be either verbal or visual puzzles – the latter shown on a screen using an overhead projector – and there are numerous books available offering lots to choose from. In the meantime, here are a couple to be going on with:

> ***Farmer Giles brings in the corn***
>
> *Old farmer Giles brought 20 ears of corn into the kitchen. It took him more than one journey between the barn and kitchen because he was a bit old and doddery and couldn't manage to carry them all in one go. On each trip to the kitchen he had three ears, so how many journeys did he make?* [2]
>
> ***Mr Brown meets a friend***
>
> *Out shopping one day, retired schoolmaster, Mr Brown, bumped into one of his former pupils from years before. 'How nice to see you again,' he declared. 'You were one of my star pupils, you know. What have you been up to since you left school?'*
>
> *'Well, I went to university and started a career in the law,' came the reply, 'and then I met and married someone you never knew, and, in fact, this is our daughter.'*

---

[2] Old farmer Giles made 20 journeys between the barn and the kitchen. On each journey he carried his own two ears – the ones on his head – and one ear of corn.

> *'How do you do, my dear,' said the old schoolmaster turning to the young girl. 'And what is your name?'*
>
> *'Why, it's the same as my mother's,' replied the daughter.*
>
> *'Well, Jane, I'm very pleased to meet you,' said Mr Brown. But how did he know the girl's name?*[3]

Hopefully, these should get people calling out suggestions until someone finally hits on the answer. Beware, though, of choosing a puzzle that's too difficult. If no one can solve it the group's confidence will be undermined rather than boosted. Also, do make sure that everyone participates.

Once you've got people warmed up you can then introduce the topic for the session.

It is best not to encumber your group with lots of background information, demographics and so on. If possible, try to pare down the brief to just one task or proposition that you want them to focus on.

Sometimes it can be helpful to start, not with the truth about what the creative session is really about, but by introducing some analogous situation. This can be particularly valuable if the subject of the session is something that might worry the group in some way – perhaps it's something they would feel they know nothing about. Instead of prompting a lot of questions or self doubt it can be easier to introduce a different subject in a similar situation that they might feel more at ease with.

A different approach that can stimulate creativity is for the group to begin by role-playing as members of the target audience – perhaps you could even have a few props to stimulate the imagination. In role, the participants can be asked to imagine their lives and the different things they do. These could be listed on a flip chart, and you could then ask for PR ideas for each item.

A third approach is to ask your group to tackle the opposite of what you require. For example, if you were working on the launch of a new family bath soap, you might choose to ask the group to think of ideas to promote grubbiness and poor personal hygiene. Because that is a slightly off-the-wall idea and much more fun than soap you'll probably find you'll get loads of concepts. However, once you've got enough, you then need to twist it back around the other way and ask the group to turn each idea into something workable for the new soap brand.

[3] Mr Brown's former star pupil was, in fact, a woman – Jane's mother and, of course, herself named Jane.

The point is that putting some energy and creativity into running a brainstorm session will pay off. Participants will be stimulated, they'll enjoy taking part rather than finding it a chore and you'll get more ideas as a result.

If, after a time, you find that whichever approach you're taking is beginning to pall and people are becoming bored, switch to a different approach. Perhaps you'll also need to refresh the group by playing another quick game.

What can also help is the introduction of a competitive element by splitting the group into two teams. Both teams have to work on developing ideas for a time before subsequently having to report back to the full group on what they've come up with. A little competitive pressure is a great mind focuser.

As well as adopting approaches that aim to stimulate creativity be careful not to do anything that shuts it down. Top of the list of banned attitudes is negativity. This means preventing people from making critical comments about the ideas of fellow group members. As soon as someone is told that their idea is stupid they'll probably clam up and not say another word. You also need to be careful that you don't make negative comments yourself, like 'we tried that last year and it didn't work' or 'actually the client wouldn't like it'. Treat every idea equally as a potentially good idea and you'll keep everyone positive and participative. If you know that some ideas won't work for whatever reason, keep it to yourself.

The best approach is to agree the 'no negativity' rule with the group from the outset, write it down and stick it on the wall. Then if anyone makes any negative comments you can simply remind them of the rule, or people can remind you if you slip up.

Similarly, avoid challenging people to explain how their idea would actually work. Firstly, you'll risk putting them on the spot and embarrassing them. Many of your participants won't be PR experts so they won't be equipped to work up an idea beyond a fairly broad concept, but also, for any group member, as soon as they get bogged down in the mechanics of making an activity work they'll switch out of creative mode, which is the last thing you want in a creative session.

However, if someone comes up with an idea that is just too vague, you can praise it and then ask the entire group whether anyone can think of ways of building on that concept.

In chairing the session you need to be fair, positive and energetic. Encourage everyone to participate, try to prevent the odd one or two people from dominating proceedings and write all ideas up on a flip chart. This will allow participants to see that you've noted and are taking seriously their suggestions and people will also be able to easily refer back to previous concepts.

Turning creative concepts into workable activities

Hopefully, by this stage, you will have a wealth of good ideas. You now need to pick through them and decide which ones offer you the strongest potential. These are the ones that will be worked up by you and your team if you have one.

As you investigate and cost your campaign activities you again have to wear your planner's hat to ensure that no idea drifts off strategy as it is developed. This can easily happen. Take the idea for the newspaper feature series that was originally bang on strategy. You put it to the newspaper's editor who loves it but suggests a few changes. You, naturally, are so keen to make the idea happen that you don't notice that it has now drifted off strategy. At some point, therefore, you need to don you planner's hat again and look at all the activities objectively to ensure they still match the original strategy. If not, you have to be prepared to be brutal.

People sometimes ask whether PR campaign ideas can be tested with the target audience in the way that advertising creatives are put into research. Unfortunately, most of the time they can't. The problem is that what most PR people produce is very rarely the final thing that the target audience will ultimately see, only an intermediate step designed to stimulate the end result. For example, a press release or a press conference will not be seen by the target audience, but is intended to stimulate the press coverage that will eventually be seen by them. If you expose this process to people they don't like it, because you are revealing to them that all is not as it appears. You are exposing the news item, apparently written by the newspaper's journalist, which is in fact stimulated by an unseen PR person and you are uncovering the fact that the true driving force may not be the journalist's desire to explain but the agenda of the PR person and their employer.

The only PR campaign ideas that can be tested with your audience are activities that, like advertising creatives, are obvious end products in themselves – booklets that you intend to distribute to them, for example, or those amalgams of magazine editorial and advertising, 'advertorials'.

Audience research is great for testing campaign messages and elements of your strategy, but – apart from the few exceptions – is useless for testing campaign ideas. However media campaigns can and should be tested with your intermediate audience, the media themselves. Do they like the ideas? Will they publish the stories in the first place? These questions are so fundamental to whether your campaign will actually work or not that investigating the answers should be a crucial stage in your campaign development.

Measurement and evaluation as a planning tool

THE EVALUATION DEBATE

SELECTING EVALUATION TOOLS

OUTPUT MEASURES

OUTCOME MEASURES

chapter 6

Chapter 6: Measurement and evaluation as a planning tool

By now we've decided who our target audiences are and we've gained much insight and understanding of them, and we've decided what our objectives are, going on to define our strategy to meet them. That strategy has been developed into the creative tactics, so now, at last, the campaign can begin and the planning role has ended – right? Wrong.

Yes, the campaign can begin, but as it progresses it needs to be monitored to ensure it's on track and achieving what's required. If it is failing to achieve enough national newspaper coverage, for example, somebody needs to recognise that fact pretty quickly and look for ways to correct the failing. It isn't enough to just provide evaluation at the end of the campaign – by then it's too late to do much about it – so a level of performance assessment should be on-going.

However, it is the full review upon completion of the campaign that provides the strongest opportunity to use measurement and evaluation as a planning tool. The problem is that many people don't believe it is even possible to evaluate PR.

The evaluation debate

The topic of evaluation has long been debated within the PR industry, among companies and organisations that use PR, and beyond, for example in the media. There are three main issues:

- The frequently repeated claim that PR cannot be evaluated in the way that advertising can.
- The cost of evaluation – who is prepared to pay for it and how much are they prepared to fork out?
- The question of what the evaluation is for. Is it merely a justification of the spend on PR or is it trying to do more?

Of course, all three issues are interrelated. It is entirely possible to measure and evaluate PR activity – as we will see – and some of the tools are very similar to those that might be used to evaluate advertising. However, most of those tools are expensive to use and often the cost is disproportionate to the level of spend on a PR campaign. For example, a relatively modest research-based tool might account for a tenth of a typical consumer PR budget. Many PR agencies, fearful that they might be forced to pay for this out of their fees (and sometimes, perhaps, fearful of evaluating a less than successful campaign) have kept their heads down on the issue. Consequently, many clients have gained the impression that either the PR industry isn't very interested in evaluating its work or that it simply isn't possible to measure success in PR.

In fact, what most people tend to focus on is evaluation as a justification of the PR budget – something to demonstrate whether the campaign is worth the money or whether the budget should be cut? However, if everyone viewed measurement and evaluation as a beneficial planning tool that can be used to produce better campaigns – in other words, something entirely positive – perhaps they might feel more inclined to invest in it.

Incidentally, the idea that evaluation is expensive per se is a complete myth. Certainly some tools – perhaps the most attractive tools – are relatively pricey but, at the other end of the scale, there are do-it-yourself measures that don't cost a penny.

Selecting evaluation tools

Broadly speaking, PR evaluation can be divided into two categories, 'output measures' where you assess what your campaign has produced – usually that means the press coverage – and 'outcome measures' where you look at what the campaign actually achieved.

In the main, output measures are the easiest to provide and therefore the least expensive. There are, for example, output measures that you can do yourself at no cost (apart from your time). Most outcome measures, on the other hand, are usually research based and require the employment of specialist expertise that, naturally, comes at a price.

The starting point for your evaluation is the PR objectives that you set as part of the strategic planning process. Essentially, what you will be measuring is how far you have achieved your objectives. Surprisingly, within the PR industry the two things, objectives and evaluation, are often seen as being entirely unrelated – experienced PR practitioners have argued as much, quite strenuously. This view has probably come about because of the perceived need within the agency world, particularly, to set 'big' objectives injected with a heavy dose of salesmanship. This has resulted in objectives of the 'make people believe that X is Y' variety. They aren't intrinsically wrong, of course, but just require you to demonstrate how far you have actually shifted people's beliefs. The only problem is that such a demonstration is complicated and expensive to conduct. Instead a media evaluation company is commissioned to produce a report measuring and analysing the press coverage. This is usually impressive and perfectly satisfactory, and everyone is happy about their commitment to evaluation – except that it doesn't relate in any way to the objectives and nobody has any idea whether the campaign achieved what they said it would.

It seems to be a common sense rule to define the PR objectives as a clear statement of what you are setting out to achieve, and evaluation as the measurement of how far you've actually achieved it (and how you can better achieve it in the future). If you have to be big and grandiose, maybe you need to set some broader aims, perhaps as part of Stage 1 of the strategic planning process. In contrast, your PR objectives are the one place where you ought to be sensible, realistic and, above all, measurable.

Your PR objectives will govern the evaluation tools that you will use. Or, to look at it another way, the evaluation tools that you can afford to use will govern to some degree the PR objectives that you can set. So, rather than being unrelated, objectives and measurement are inextricably entwined together.

Output measures

The longest established and most discredited output measure is the 'Advertising Value Equivalent' (AVE). This is a simple DIY evaluation tool that is based on the amount of space achieved for each item of press coverage and how much it would cost to advertise in that space, based on the media's published rate cards. The main criticism of this method centres on the fact that it encourages the myth that PR-generated media coverage is simply free advertising. Firstly, it's not free – the PR practitioners or agency have to be paid, of course – and it's not advertising because what is published is reinterpreted to some degree by the journalist and appears under his or her name, not the client's. But worse than that, the AVE fails to take account of the true value of editorial coverage in the media – the credibility and believability that comes from it being written by an independent third party, and the mere fact that it is more likely to be read than an ad (an average of 2.22 times more likely, to be precise[4]).

[4] *The Effectiveness of PR*, a study conducted during the 1990s by VA Research and commissioned by Welbeck Public Relations.

However, all of that said, the actual unit of measure employed for your media evaluation matters much less than how you use it. What you require is a system that does more than just give you an impressively large but ultimately meaningless number. It needs to be something that tells you how your campaign worked – what went well and what went badly – and how you can make it work better in the future.

The factor that makes evaluation most informative is comparison. This means that you should measure your media coverage using as many different units of measure as possible. For example, you might measure volume (number of column centimetres), insertions (number of individual items of coverage) and reach of your specific target audience. Then relate the results back to your PR objectives, comparing the results and ideally presenting the figures graphically to aid understanding.

In the following example, the objectives specified the communication of three key messages. Evaluation, therefore, measures the degree to which those messages were actually communicated, but comparing figures shows that there's more to the results than might at first appear if you only used one unit of measure.

We see that 'Message 1' was only carried in three press cuttings, compared to the eight for 'Message 2'. On the face of it, this was a poor showing for Message 1. However, those three cuttings accounted for almost half the space achieved and a third of the target audience reached. In contrast, although 'Message 2' achieved a lot of cuttings, they weren't necessarily in the right media because reach of the target audience was not very high. There are clearly lessons to be learned here about choice of media.

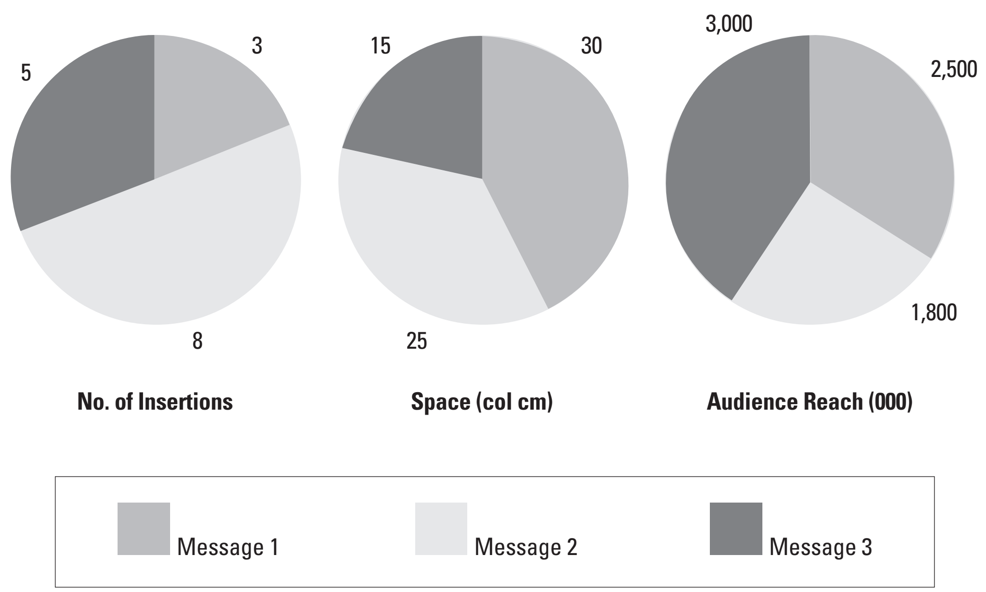


Figure 7: Evaluation of a PR campaign

The way a PR campaign works is often more complex than it at first appears. This sort of comparative approach demonstrates that and allows you to delve deeper into the results, rather than just being left with a superficial bottom line figure that may sound impressive but is in fact fairly meaningless.

Use of comparisons could be applied in many different ways – for example looking at the different media categories that your campaign appeared in (e.g. national newspapers, regional newspapers, women's weekly magazines etc.) or the media sections used (e.g. news, features, personal finance, sport, letters etc.). In fact, you may choose to specify which media sections you need to be in as part of your objectives. It may be appropriate, for example, for a financial services company to specify that half of its media coverage should appear in general news or feature pages outside the specific personal finance sections.

Also you could look at the slant of the coverage – whether it's positive, negative or neutral – again comparing media categories or even specific journalists. You may get a surprise, finding perhaps that the journalist who has consistently been a thorn in your side for his negative coverage of your product isn't, in fact, read by many of your target audience anyway.

You can do all of this yourself with a little thought and effort. Even the graphs can be produced fairly easily on a modern personal computer. However, it does take time, and if you have the budget available you may choose to use an external media evaluation service. There are a myriad companies to choose from – *Precis, Echo, Mediatrack, Metrica, Carma* and so on. It is best to see presentations from a few of them and choose the one that best suits your needs. However, the point is that if you can't afford to use an external evaluation company it is still possible to evaluate your campaign almost as well doing it yourself. Furthermore, if you do employ an outside company it doesn't mean that you can 'wash your hands' of the evaluation process. You will still have to do much of the ultimate analysis of the results yourself, because only you will know what you did or didn't do in your campaign and only you can decide what you should do differently next time.

The biggest problem with output measures is the more sophisticated you get the more you are faced with questions that you just can't answer using these tools – did anyone in your target audience actually notice the campaign, did it change their attitudes and did they do anything as a result? The only way to answer these questions is to use outcome measures.

Outcome measures

The ultimate measure of outcome is whether a PR campaign has achieved the overall objective – has it increased sales, improved market share or raised the share price? Of course, it is usually impossible to isolate the contribution of PR from those of other communications disciplines – not least advertising – and it is only on those occasions where PR is the only tool used that this is a valid form of evaluation. That is why the overall objectives and the PR objectives have to be separate – the PR objectives being the measurable contribution to what ultimately needs to be achieved.

So which outcomes can you isolate and measure? Well, sometimes you can try to build in some measurable mechanics to your campaign, such as distribution of money-off vouchers or calls to a hotline that can be coded and attributed to PR. However, this is only suitable for a minority of PR programmes and can also be a little hit and miss with the potential for some consumers to respond to your campaign without necessarily using the trackable vouchers.

This means, therefore, that the majority of outcome measures you will use will be research-based tools. Sadly there is no DIY option here and you will have to hire a specialist company to conduct what will most likely be quantitative research, with two main options available to you:

- The 'Pre and Post' Study – this is where you conduct research among your target audience prior to the campaign starting to establish a benchmark against which to measure your results. The second round of interviews takes place at the end of the campaign and you look at any shift in figures. The questioning might typically look at awareness of the subject, awareness of the campaign, attitudes to the subject, and whether the audience sample have felt inclined to do what you have been suggesting to them (for example buy the product).
- The 'Tracking' Study is a more sophisticated option. It is where you carry out 'dips' of research at regular intervals during the campaign and at either side of it to see how awareness and attitudes might fluctuate in response to different elements of the campaign, and what happens to them after the campaign has finished.

Even though you may be using outcome measures you will still need to use output measures to run alongside them and to give you the comparisons that highlight the lessons to be learned. In recognition of this there are now a number of companies that can provide both output and outcome measures in combination – for example *Test Research* (which is part of MORI) and *Millward Brown* (which acquired *CMS* the providers of the *Precis* system).

The big problem with these research-based tools is that they are not always as unequivocal as you might expect. In the first place, you can't ask the audience sample the direct question of whether they recall seeing a PR campaign because they don't know what a PR campaign looks like. Moreover, if they realised that what they had read in the paper was the result of a PR campaign they are likely to be unhappy and disappointed.

But worse than that, people's memories can sometimes play tricks with them, and occasionally they have also been known to lie. Certainly, people can recall seeing something but not quite remember where. Often, in that circumstance, they will think it's an advertisement they've seen – usually a TV ad for some reason – even though no such ad may have been appearing. The only way round this is through very carefully-phrased questioning, so it is essential to use and take advice from research companies who are experienced in this area.

The most important thing of all to remember is that just by using sophisticated evaluation tools – whether output or outcome measures – you will not guarantee good results. You have to be realistic and precise in your expectations – in your PR objectives, in other words. Remember that advertising usually spends several million pounds on achieving its objectives. PR rarely has a budget that is anywhere close to that sort of figure, so its objectives need to be smaller scale, more focused and more achievable. It's only then that you are likely to achieve an outcome that you can actually measure.

Media planning

THE MEDIA PLANNING FORMULA

AUDIENCE DELIVERY

ENVIRONMENT

TECHNIQUE

chapter 7

Chapter 7: Media planning

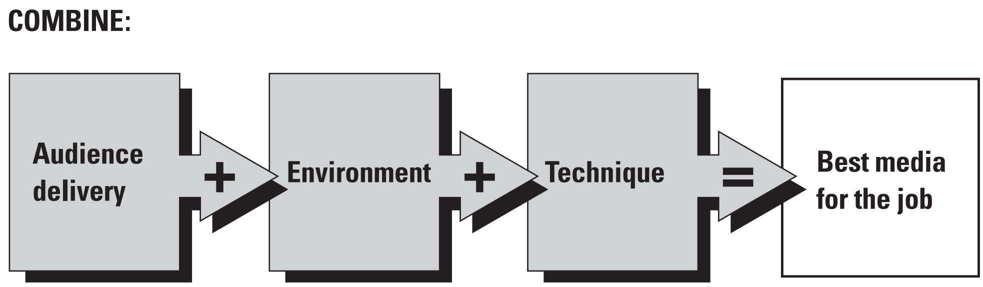
A common assumption when people hear the term 'planning' used is that it relates only to the very specific task of media planning – the selection of the media to be addressed in the PR campaign. In fact, this is a very narrow view of the planning discipline and we've already seen how much wider and more far reaching it can be in strategic development and the measuring and evaluation of PR campaigns.

However, media planning is still an element of the discipline and one that shouldn't be underrated. Selecting the right press, TV and radio stations to be targeted is a skill that can be required almost daily in a busy press office and it plays a fundamental role within the strategic planning process itself as part of the analysis of how to reach the target audience.

Yet there are many PR practitioners who believe they require no help in selecting media. They are supposed to be media experts so that means they know everything there is to know about the press, radio and TV – or so they think. The problem is that there has been an explosion in media. Every week there are new titles launched – to say nothing of the rejigs and relaunches – all adding to the huge total of outlets. At the time of writing there were approximately 1,300 newspapers, around 300 TV stations, nearly the same number of radio stations, no less than 10,000 magazines, and somewhere in the region of 2 million websites. In fact this isn't a problem at all. While it may complicate life for PR practitioners it helps them at the same time, by making it easier to focus on and communicate with very specific target audiences, making campaigns more effective and making budgets work harder.

But no PR person can hold in their heads adequate knowledge of this vast, expanding media universe. They need a methodology to help them select the right titles for the task in hand, backed up by a selection of information tools and these are what this chapter aims to provide.

The media planning formula



Audience delivery

Step one of the media planning formula is to focus on audience delivery. First you need to decide on your target audience and then produce a list of the top media – preferably ranked – that maximise delivery. At this stage you're concentrating on hard numbers only, but you need to produce a substantial list as some titles may be removed in the later stages of the process.

The principal tools to assist with measuring audience delivery are the main media research products:

- The *National Readership Survey* (NRS) measures the average issue readership for national newspapers, women's weeklies and monthlies and other selected titles. It also breaks down the readership by age, sex and socio-economic group and selected special interest groups such as housewives with children, members of car-owning households, holiday takers etc.

  At the time of writing NRS had proved resistant to letting PR agencies subscribe to their data. However, with many agencies affiliated to, or owned by advertising agencies, it should be easy enough to access through that route. Similarly most companies or organisations that use PR also use advertising and so could access this data through their ad agency. However, if that is not possible magazine and newspaper publishers are often happy to supply a ranked list of titles for their category. The trick is to approach the publications that are plainly top of the list and they are usually happy to demonstrate their market position. Failing that, much of the data is published in the reference book *Brad*, although it is easier to access via the new online version *Bradnet*.

- The *Broadcasters' Audience Research Board (BARB)* measures TV audiences on a weekly basis, breaking down the figures into the number of adults and children, and men and women watching programmes. It also has a limited number of fairly broad sub categories, such as housewives with children, ABC1 adults, 16 to 34 year old men etc. As with NRS, BARB declines to directly supply data to PR agencies, although they will provide copies of their weekly press release giving the audience totals for the most popular programmes on each channel. However, dealing with a friendly ad agency can again, circumvent this limitation on access.
- *Radio Joint Audience Research (RAJAR)* provides quarterly reports detailing audience information for national and local commercial and BBC radio stations. The figures include weekly reach, total hours and share, together with half-hour audience averages for weekdays. Audiences are also divided into age, gender and demographic profile. Happily, RAJAR is prepared to let PR agencies subscribe or, indeed, anyone else who's prepared to pay the annual charge, and, even then, they give away a limited amount of information free on their website.

In addition to these tools, *Target Group Index (TGI)*, which we looked at in Chapter 2, can be extremely helpful with media targeting.

Environment

Having produced a list of the top media for delivering to your target audience, you then need to decide which titles provide the best or most appropriate environment for your message. In other words you are overlaying a quality judgement on the quantity measurement of step one.

To use an extreme example, if you were running a PR campaign aimed at persuading young men to join a monastery you might feel that the lads' magazine, *Loaded*, with its celebration of more worldly pleasures (to put it politely), might be a somewhat inappropriate environment for your messages even though it offered good delivery of your target age group.

Of course, not every situation will be as obvious as that, but you might decide that a certain publication was too flippant and lightweight, say, for your very serious messages, or that its style or positioning was in some way contrary to what you wanted to say.

Unfortunately, there are no tools to help you with this step, other than your own experience and observations. This means that you have to familiarise yourself with your target media, reading, watching or listening to the different sections within them, noticing the various tones of voice adopted, and the journalists' pet hates and favourite issues. Deciding which titles to cut from your list will be an important judgement call on your part and in making it you will be entirely reliant on your own knowledge.

It naturally makes sense to try to feed that knowledge all the time rather than just waiting for when some media planning is required. This means that PR practitioners can never be just ordinary members of the public in how they consume the media and can't just limit their choices to those titles and programmes that they personally enjoy. They need to experience it all – or as much as they can manage – and can't afford to be sniffy about watching popular TV programmes, for example, or snobbish about reading the tabloids. That's a luxury reserved for normal consumers, while PR people, as a matter of professional pride, need to sample a varied and extensive media diet in an objective and analytical way. Not only will it assist with media planning but it will also keep them in tune with popular culture and help stimulate creativity.

Technique

By now quite a focused list of target media should be developing. Application of the third step will complete the process. Here you need to take account of the range of PR techniques or mechanics available to you and overlay this final element on your media selection.

Broadly speaking, PR techniques can be split into two categories:

- 'Freefall' mechanics where you don't ultimately have control over how and when the media will use what you provide, although you may, of course, retain influence. These include press releases, photocalls, interviews and press conferences to name but a few.
- 'Controlled' mechanics where, through some form of *quid pro quo*, you retain an element of control of how and when your material will be used. These include advertorials, competitions, radio promotions, reader offers (when the first 200 or so people to write in receive a free gift) and so on.

In essence you need to decide which PR techniques you are going to use in your target media, taking account of the following factors:

1. It has to be suitable for your message. (The reader offer approach probably wouldn't be right for your attempt to attract new members to the monastic life, for example.)
2. It has to be viable within the chosen media. (If some publications on your list will not publish contributed press releases either you drop those titles or you choose a different PR technique.)
3. It has to be affordable within your budget and offer reasonably good value for money. Work out and compare the cost per thousand for different techniques by dividing the cost of each mechanic by the number of thousands of readers it will deliver. (You may find that an advertorial is the only way to get your messages across in *Readers Digest*, say, but the value for money is better using a different technique in a different title.)

By combining and juggling the three elements of audience delivery, environment and technique you will be selecting the best media for the job – and you'll not just believe that but *know* it, because you will have hard evidence backing your decision.

The pleasure of planning

EXAMPLES OF PLANNING IN PRACTICE

THE TEN GOLDEN RULES OF PLANNING

CONCLUSION

chapter 8

Chapter 8: The pleasure of planning

Throughout this Report, in the exploration of the strategic planning, media planning and evaluation processes, the emphasis has been on the gathering of evidence. The replacement of gut feel, guesswork and assumption with information, hard facts and knowledge is at the heart of PR planning. But that doesn't mean that there isn't a place for a little intuition and imagination.

As you work your way through the planning process you will hopefully benefit from flashes of inspiration about how the marketplace *might* work, or what the target audience *might* believe. Pursue these by all means. You are probably right, you have a great deal of experience after all, but always, always check them out. Find out whether these ideas are really true and turn the guesses into facts.

Never base a strategy on assumption. You may be able to get away with it a few times but eventually you *will* be caught out.

The pleasure of planning – yes it can be pleasurable and even exciting – is the way that it is essentially about solving a big puzzle. The solution is the strategy, the plan of how to solve the objectives.

Perhaps an even better analogy is the detective mystery, like an Agatha Christie whodunit. In this case there is no ghastly murder, but there is a problem that needs solving. To begin with you have no idea of how it will be resolved, but then you begin gathering information, interviewing people and investigating clues and, like Christie's great detective, Hercule Poirot, you use your 'little grey cells'. Perhaps you get a spark of intuition that gives you a whole new area to investigate, and inevitably there are red herrings to be avoided, until eventually, to great personal satisfaction, you can reveal the answer.

So planning has many benefits: the development of clearly thought-through arguments for a proposal, the production of more radical and exciting strategies, the implementation of better PR campaigns and now you can add one more – the pleasure and satisfaction of solving the puzzle.

Examples of planning in practice

So how did others go about solving their puzzles? The following are brief examples of campaigns where planning delivered solutions that were not obvious but which proved to be successful.

The launch of Persil Tablets

One of the great success stories in product innovation, Persil Tablets, took Lever Brothers to leadership of the detergent market. PR was crucial in explaining the concept to consumers. As part of the planning process research was conducted that indicated a need to segment the target audience into young mums, empty nesters (older people whose families have grown up and flown the nest) and a group who were defined as 'bungers' – younger, single, professionals, particularly males, who can only be bothered to 'bung' their laundry and detergent into the washing machine without measuring it out!

As a consequence, the PR campaign – and the media choice – was tailored to the specific audience segments. That included activity in men's style magazines like *FHM* that, until then, would not have been an obvious choice for PR communications relating to laundry detergent. It was planning that identified this radical approach.

Raising awareness of e-commerce

In the 1990s, before e-commerce really took off, Microsoft wanted to raise awareness of the potential of the Internet. Planning recognised that the best way of showing this was by demonstrating its uses. How better to do that than by putting it to the ultimate test of showing people surviving using e-commerce alone? Creativity extended this concept into 'Naked in a Room with the Internet' in which four people had to live, feed, clothe and entertain themselves for a week only using the Web. That marriage of planning and creativity amply made its point.

Attracting local people to Covent Garden Market

Covent Garden Market in London had always been a popular attraction for tourists, but PR was required to attract the local workers and residents who were tending to stay away. Planning, in the form of research among those local people, discovered that they didn't shop there because they didn't know there was anything sold that would appeal to them – they assumed it was just 'stuff for the tourists'. PR was then able to concentrate on helping people discover what was on offer at Covent Garden Market.

The ten golden rules of planning

As a summary we will conclude with ten useful tips. If all that you remember and follow from this Report are these golden rules you should still see an improvement in your PR campaigns, gaining better results, becoming a more rounded PR practitioner and hopefully discovering the pleasure and satisfaction of strategic planning along the way.

THE 10 GOLDEN RULES OF PLANNING

1. Make no assumptions – planning is about evidence and hard facts.
2. Planning is only as good as the information that goes into it.
3. Use your intuition – but only as a way of seeking routes to investigate – then seek the evidence.
4. Make room for creativity – let your brainstorm or creative session have an influence on the strategy but any changes you make must fit with the evidence you've collected as part of the planning process.
5. If the strategy is exciting, the activity has to live up to it.
6. Keep the activity on strategy.
7. Make sure the objectives are measurable – and use an evaluation method that actually measures them.
8. Learn from the evaluation – it's not just a way of justifying PR spend.
9. Avoid presenting more objectives as the strategy – the strategy should offer the solution.
10. Avoid presenting detail in the strategy – it's the 'big-picture' plan, not the tactics.

Conclusion

Now that we have reached the end of the Report – and assuming that you followed the suggestion right at the start – you will have found the slip of paper listing what you wanted to achieve by reading this. Hopefully, you are able to tick off every item, but if not, ideally you will at least have the interest and the basis to explore and research the subject further.

But has the Report met the author's objectives? Well, at the very least it has given you an introduction to the subject of PR planning – which was the first objective. You will surely have picked up a few useful tips to improve your work – the second objective. Just the 'Ten golden rules' in this chapter alone should be enough to make a difference. But what of the third objective? Has this Report given you the basis for a whole new approach to the way you conduct PR? Only you can be the judge of that when you plan your next PR campaign.

Useful telephone numbers and website addresses

appendix

Appendix: Useful telephone numbers and website addresses

Evaluation and measurement

There are numerous companies offering evaluation and measurement services to the PR industry – far too many to provide a definitive list here – but details of some of the more well-known names are provided.

- **Carma**: 020 8877 3314
  www.carma.com
- **Echo**: 01483 413600
  www.echoResearch.com
- **Mediatrack**: 020 7430 0699
  www.mediatrack.co.uk
- **Metrica**: 020 7836 6938
  www.metricauk.com
- **Millward Brown**: 01926 452233
  www.millwardbrown.com
- **Precis** (part of Millward Brown): 020 7654 0700
  www.mbprecis.com
- **Test Research**: 020 7689 8484
  www.testresearch.co.uk

Government statistics

The Office for National Statistics has a wealth of valuable statistical information that can be easily accessed via its website. Other government departments may also have useful data. The UK Government website offers the handy facility to search all departments.

- **Office for National Statistics**: 020 7533 6363
  www.statistics.gov.uk
- **UK Government website**: www.open.gov.uk

Internet monitoring

If you want to find out what's being said about a company on the Internet, arguably the best search engine to start you off is Google. However, with literally millions of websites to monitor, not to mention all the newsgroups, you will probably find you need professional help from a specialised company.

- **Google search engine**: www.google.com
- **CyberAlert monitoring service**: 01908 503303
  www.cyberalert.co.uk
- **Infonic monitoring service**: 020 7490 8844
  www.infonic.co.uk

Libraries and information services

Public libraries are a useful source of free information. In addition, privately-owned libraries and information services can provide more specialised data but will probably charge for their time (like most of those listed below) or, in the case of the CBI and IoD, will require membership.

- **BBC Information & Archives Commercial Unit**: 020 7557 2452
- **British Library Business Information Service**: 020 7412 7454
- **Confederation of British Industry**: 020 7379 7400
  www.cbi.org.uk
- **Financial Times Global Archive**: 020 7873 3000
  www.globalarchive.ft.com
- **Institute of Directors**: 020 7766 8888
  www.IOD.co.uk
- **The Information Bureau**: 020 7924 4414
  www.informationbureau.co.uk

Market information publishers

The following companies publish a wide range of reports analysing various markets. They usually cost several hundreds of pounds to purchase although many are available to peruse via libraries. The publishers' websites detail the reports available while Keynote's also provides free access to the executive summaries of their reports.

- **Datamonitor**: 020 7675 7000
  www.datamonitor.com
- **Keynote**: 020 8481 8750
  www.keynote.co.uk
- **Mintel**: 020 7606 4533
  www.mintel.co.uk

Market research companies

There are hundreds of research companies of various sizes and specialisations to choose from in the UK. I have therefore only provided details of four who are mentioned in this Report – two large and two smaller – but the British Market Research Association is able to help with the selection of suitable companies from among its membership.

- **MORI**: 020 7928 5955
  www.mori.com
- **NOP**: 020 7890 9000
  www.nop.co.uk
- **VA Research**: 020 8994 9177
  www.varinternational.com
- **Visionpoint**: 020 8444 5727
  www.visionpoint.co.uk
- **British Market Research Association**: 020 7490 4911
  www.bmra.org.uk

Media information

The following organisations can, between them, help you find out not only how many people in total read, view or listen to particular publications or programmes, but also how many people are in your specific target audience.

- **Audit Bureau of Circulations**: 01442 870800
  www.abc.org.uk
- **BRAD media directory**: 020 7505 8458
  www.brad.co.uk
- **Broadcasters Audience Research Board**: 020 7529 5531
  www.barb.co.uk
- **Independent Television Commission**: 020 7255 3000
  www.itc.org.uk
- **National Readership Survey**: 020 7632 2915
  www.nrs.co.uk
- **Radio Joint Audience Research**: 020 7903 5350
  www.rajar.co.uk
- **Target Group Index (TGI), part of BMRB**: 020 8566 5000
  www.bmrb.co.uk

Subscription-based online databases

The following organisations offer the means to access information from your personal computer ranging from a searchable database of past press coverage to advance warning of forthcoming news events.

- **Lexis-Nexis**: 020 7464 1300
  www.lexis-nexis.co.uk
- **Profound**: 020 7940 6900
  www.profound.com
- **The Profile Group** (Foresight, Press Planner, Programme News, Fashion Monitor and Entertainment News services): 020 7440 8549
  www.profilegroup.co.uk
- **Future Events News Service**: 020 8672 3191
  www.fens.com