

A Thorogood Special Briefing

Chapter 1

What is strategic planning and why do we need it?

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Introduction

As our subject is planning we should take a planner's approach to the task of tackling this Briefing. 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 Briefing, 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 Briefing 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 teaches 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

inking about planning. This is probably because they're the ones who are the 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 Briefing 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 Briefing 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 Briefing the intention has been to avoid the academic approach and produce a practical guide that suggests techniques and approaches that 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 (i.e. better than the approach still most frequently taken in the PR industry.)

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 this 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. 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 as the new century approached PR agencies would start to follow ad agencies in appointing planners. So far there are only a handful, mainly within the larger agencies, and many 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 Weber Shandwick Worldwide – one of the largest PR agencies – commissioned some research into how companies in Britain perceive public relations and the people who conduct it¹. 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 the same people who took part in this research 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.

¹ *‘What Clients Really Think’*, a research study commissioned by Weber Shandwick Worldwide and conducted by Visionpoint.

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.