

An introduction to public relations planning

Let's look at the public relations planning process by examining an example of one part of a campaign.

Imagine you are the publicity manager for a theatre company, UPSTAGE. Along with a new artistic director you have just been hired with a brief to rebuild UPSTAGE's reputation following a disastrous year of failed productions.

It is your immediate task 'to put bums on seats' for *Stare*, a new and somewhat controversial hit play premiered recently in New York and London.

You decide to use the PR planning method to define and control the content of a letter you will send to the 2000 patrons on UPSTAGE's mailing list.

PR PLAN

Step One - Situation analysis

Let's assume that you have written a *Background* statement (that details in general your organisations strengths, weaknesses, opportunities and threat in relation to identified target publics). Then, under the heading of *Research*, you have stated your methods of *secondary research* into contemporary theatre, the play itself and relevant demographics. Under *primary research*, maybe you stated that you used *qualitative research* (focus groups) to explore issues and generate sufficient information to construct a questionnaire to be used in a *quantitative* random sample survey to determine the psychographics, attitudes etc., of the key target public(s). (The latter would be used to provide baseline data against which you would later be able to measure any target public attitudinal changes brought about by the execution of your plan). Note here that for the purposes of ALR103 you do not have to carry out the research. You merely have to state what research you would undertake.

You must now write problem statements. The available data suggests:

Problems

1. *That most patrons view UPSTAGE as likely to produce disappointing plays because they have either attended or heard about one or more of the past year's poor productions.*
2. *That few patrons plan to attend the new production because they believe that it is likely to be a disappointment.*

Note that problem or opportunity statements begin with the word 'that' and they state a reason following the word 'because'. It is also important to understand that you must define **communication** problems/opportunities that can be solved through deployment of public relations tactics. So all problems/opportunities must be cast in terms of either the **thoughts or actions of target publics**. Defining the problem as a shortage of working capital, for example would not be relevant to a PR practitioner (unless that person were involved in cross-functional management problem solving). This would be a more appropriate problem for a financial manager.

The guiding principle is that you cannot write a problem/opportunity statement without defining a target public and assessing what they may think or feel or do. Do not define too many problems or opportunities – prioritise.

Step Two - Objectives

Good objectives should be specific, measurable, achievable, realistic and time related. So they should:

- ✓ solve the problems or exploit the opportunities defined
- ✓ be consistent with the broader goals and objectives of the organisation for which you are acting
- ✓ be achievable with your chosen PR tactical devices
- ✓ be governed by a deadline
- ✓ specify the means by which you will measure whether or not your objectives were reached.

For each problem or opportunity, there must be a corresponding objective. Sometimes you will have two –for example if you have an informational and motivational objectives

So in view of the two problems you have written, your objectives will be something like:

Objectives

1. *To convince 75 per cent of the 2000 patrons on the mailing list that the new play is distinct from and better than the past year's disappointing productions. The achievement of this objective to be measured by a random sample telephone survey to be undertaken seven days before the play opens.*
2. *To convince 15 per cent of the mailing list patrons to attend opening night and a further 50 per cent to attend the balance of performances over the scheduled two week run of the play. Achievement dates will obviously line up with the performance dates of the play. The achievement of this objective will be measured by monitoring ticket sales.*

Note how the objectives flow out of the problems on a one-for-one basis and are target public focused. Also note that you must make a reasoned guess at what percentage of the target public you will, in practical terms, be able to convince.

Step Three - Target publics

For our purposes we will define target publics as:

‘Those with whom you must communicate in order to reach your objectives’.

Whilst definition and analysis of target publics sits here at step three, some of this information is needed to be able to write problems/opportunities and objectives. This is the reason why, in practice, target public analysis forms part of the research section which precedes problems and opportunities under *Situation analysis*.

Sometimes you will identify more than one target public relevant to a situation. For the purpose of this Unit you may list all relevant publics here but you should nominate one, or at the most, two primary publics for whom you will answer the questions overleaf. In other words, keep it simple!

The answers to the following questions form the **Target Public** section of your PR plan.

Target Public

- I. Which target publics must I reach in order to achieve my objectives?
In this situation the principal target public are the 2000 patrons on the mailing list. They are males or females, predominantly 18 to 30, who reside in the inner city area. Most are university students or workers in their first jobs, one to three years out of university.
- II. How do they view themselves and the world around them?
Research shows they are social liberals – sympathetic to Aboriginal, gay and environmental issues. They see themselves as inner city sophisticates, tuned in to international trends in music, art and fashion.
- III. How do they think about the issues I wish to address?
The target public is fickle, patronising restaurants, cafes and bars that have a reputation for being ‘the latest thing’, then abandoning them when the next ‘latest thing’ comes along. They are beginning to believe that following the recent run of disappointing plays, UPSTAGE theatre ‘has had its day’.
- IV. What is their reading and comprehension level?
High.
- V. Will they read the sort of thing I am writing, or view what I am creating, or attend what I am organising? (Remember, in this instance you intend to produce a direct-mail communication).
The theatre has a detailed mailing list of patrons. The results of a past survey show that direct mail to those on this list is well read.
- VI. What style and content of communication or what type of event might appeal to them?
The target public are part of the computer generation. They don’t want to read lots of material. They want essential information, sharply presented. They would also prefer the communication to have an air of urban sophistication.
- VII. What is in their self-interest?
The target public want to be ‘up with’ the latest plays, music and arts ‘that matter’. Supporting cultural institutions is also seen as important by the group with which they identify (young sophisticates). These needs can be defined according to Maslow’s Hierarchy of Needs, Level 4, status, respect and Level 3, belonging needs.

You will note from the above that some of the information is drawn from background research. When you come to write your plans in this unit they will be based on information provided to you about a particular scenario. You may feel that you need more information than you have been given to complete this section. In the absence of actually doing the research, it will be permissible to make educated assumptions about your target public(s) as long as there is a logical connection to the facts provided in the scenario.

Step Four - Persuasive Strategy

Given the problems you have identified, the objectives you are pursuing based on the problems, and in light of the facts you have uncovered about the target public you must now develop an argument to win them over.

'Persuasive strategy' is the means by which you will persuade your target public to think or do what your campaign requires.

This section is split into *Strategy concept* and *Key messages*. In the *Strategy concept* a basic approach is to try to align in the minds of the target public what you want them to think or do with what they perceive to be in their self-interest. In doing this it would be useful to familiarise yourself with Maslow's 'hierarchy of needs'.

In this instance, your strategy concept will look something like this:

Strategy concept

My persuasive strategy is to change existing attitudes. I will demonstrate to patrons that attending the play is in their self-interest because it is a 'must' for those who want to be up with the latest theatre trends from New York and London and will show they are prepared to make a stand for the performing arts, locally.

Supporting this cultural institution will appeal to their need for status and respect and their need to be seen to belong to the social group with whom they identify (young sophisticates).

After writing the *Strategy concept* you then list a number of *Key messages*.

Your *key messages* will:

- help solve your problems,
- enable you to reach your objectives,
- suit the predilections of the target public,
- implement the strategy concept
- determine what you will write in your tactical devices.

Key messages

- *UPSTAGE has a new artistic director who has just returned from working in some of New York's most advanced theatres. She is an Australian who is determined to produce plays the theatre's audience wants to see.*
- *The play was the hit of the year with the young sophisticates of New York and London.*
- *The play is 'the latest thing' in international theatre trends and is a chance for patrons to put UPSTAGE back on the map.*
- *The play's liberal themes caused protests from conservative social groups in New York.*

Step Five - Tactics

To determine the best tactics to use you should ask the following questions:

- i. Is the medium selected the best available to deliver the key messages to my target publics, or would an alternative be more effective?
- ii. What back-up tactical devices would be effective to repeat and/or reinforce my key messages?

In this particular scenario, the direct mail letter is just one of many possible tactics for delivering your key messages. The question is, is this the most effective tactical device at your disposal?

Let's suppose you recall that the people who comprise the target public don't want to read lots of information and would prefer the communication to have an air of sophistication. You therefore might decide to send stylised postcards rather than letters carrying your key messages.

You might also feel that a spread of tactics would be better than relying on the postcard alone. So as back-up tactics you could decide to use news releases and adverts targeting the *media that are popular with the target public*. This means, for example, quality newspapers, arts programs on radio and TV, and perhaps news and current affairs magazines.

When you come to set out this section you should list (number or bullet) each tactical device with a *short* explanation of why each was selected. In complex campaigns, a range of tactics may be used from media releases to speeches and brochures and newsletters to special events and 'happenings'.

Step Six – Calendar

In a real-world situation it would be necessary to develop a calendar for your campaign. For the purpose of ALR 103 you will not be required to complete this section.

Always think carefully about timing. Think about the special needs of your target public. Think about the existence of conflicting events that might adversely impact on your campaign. Think about the impact of public holidays. Would there be a wider audience and more news space in newspapers at the weekend as opposed to weekdays?

In the scenario that we have been examining, you might decide to introduce news releases and advertising before you send your postcards. You then decide to time the arrival of your postcards two weeks before opening night. This would be early enough for patrons to make bookings and late enough so that they will not have forgotten the key messages contained in your tactical devices before the play opens. On the other hand you may consider that you want to make subscribers feel they receive 'exclusive attention' by giving them advance notice of the production by direct mail, allowing mass communication media to follow immediately afterwards. Whichever course you select, you transfer this information to a kind of graph called a Gantt Chart. This becomes a working record of the time-lines relating to production and delivery of your tactical devices.

When you draw up your Gantt Chart, you will list the range of tactical devices you plan to use and the steps in their production down the left-hand side (vertical axis). For example, production of a brochure will involve steps covering copywriting, graphics, layout, various approvals, printing and distribution. Along the bottom of the chart (horizontal axis) you will show the total campaign time-line, segmented by daily or weekly rests.

You may use a computer-generated format or a hand drawn format. But whichever method you choose it should be of a sufficiently competent standard to enable the chart to be used as a precise visual tool in the workplace.

Step Seven - Budget

In a real-world situation it would be necessary to draw up a budget for your campaign. For the purpose of ALR 103 you will not be required to complete this section.

Step Eight - Evaluation

Although you will have already provided deadlines and identified means of measurement for your objectives, this segment allows you to expand on the rationale for the measurement selected.

You may need to consider the relative merits of quantitative as opposed to qualitative surveying. Remember, in this scenario one of the objectives called for random sample telephone surveying (quantitative) for evaluation. Sufficient time needs to be allowed to construct quantitative surveys. However, they have the advantage of providing via a relatively small sample, an accurate indication (within the margin for error set) of the views of a large population.

As discussed earlier, another benefit of this approach is the ability to compare results against the base-line of target public attitudes obtained at the *Research* stage. You will be able to see what level of impact your campaign had on the total population of your target public(s). You will be able to measure the shift (if any) in attitudes or behaviours.

Over the course of a lengthy campaign a number of quantitative 'tracking surveys' may also be used to check progress and to enable fine-tuning of key messages or tactics employed as required by 'the state of play' in target public attitudes.

Sometimes, non-random surveying may be more appropriate where an indicative snapshot of attitudes is required (e.g. intercept surveying). Again qualitative surveying may be used where in-depth information as to the 'why' of behaviour is required (e.g. focus groups).

You will also remember that the second objective called for actual ticket sales to be used for evaluation. Care needs to be taken with this type of measure if it is used in isolation. Whilst it provides a true bottom line of success or failure, unless it is used in conjunction with survey methods, it will not provide data as to *why* the result is what it is.

You should use this section to discuss issues such as those raised here.

Final thought:

- Your public relations plan is just what it says, a plan. It is a working document, not an essay. It is therefore quite acceptable to use bullet points, enumeration or other devices so that the key steps stand out.
- The example you have been given here has a marketing flavour. Indeed, in today's world, public relations practitioners often work closely with marketing people when techniques other than say, mass advertising are called for to win sales. However, this is just one example of how the PR planning process can be used.
- Other applications of the plan cover the range of interactions between an organisation and its publics where a change or reinforcement of attitudes or behaviours is required.

A water authority may mount a campaign to reduce residential water consumption. A government may campaign to improve road safety. An extractive industry may wish to convince environmental groups that its mine-site rehabilitation meets international standards. A manufacturer or a service provider may wish to improve productivity and worker satisfaction by winning employees over to more participative methods of managing work. All these initiatives involve specific target publics and would benefit through application of the PR planning process.

This paper is adapted from an example contained in the Deakin University Study Guide, 'Public Relations Writing and Tactics'. Updated April 2014.