

THIRD EDITION

# WRITING

## WINNING PROPOSALS

---

*Public Relations Cases*



**SNEAK  
PREVIEW**

For additional information on adopting this title for your class, please contact us at 800.200.3908 x501 or [info@cognella.com](mailto:info@cognella.com)



Rebecca A. Gilliland and Thomas R. Hagley

# **Writing Winning Proposals**

## Public Relations Cases

*Third Edition*

Rebecca A. Gilliland  
and Thomas R. Hagley



Bassim Hamadeh, CEO and Publisher  
Kassie Graves, Director of Acquisitions and Sales  
Jamie Giganti, Senior Managing Editor  
Jess Estrella, Senior Graphic Designer  
Carrie Montoya, Manager, Revisions and Author Care  
Alisa Munoz, Licensing Associate  
Kaela Martin, Associate Editor  
Abbey Hastings, Associate Production Editor  
Bryan Mok, Interior Designer

Copyright © 2018 by Cognella, Inc. All rights reserved. No part of this publication may be reprinted, reproduced, transmitted, or utilized in any form or by any electronic, mechanical, or other means, now known or hereafter invented, including photocopying, microfilming, and recording, or in any information retrieval system without the written permission of Cognella, Inc. For inquiries regarding permissions, translations, foreign rights, audio rights, and any other forms of reproduction, please contact the Cognella Licensing Department at [rights@cognella.com](mailto:rights@cognella.com).

Trademark Notice: Product or corporate names may be trademarks or registered trademarks, and are used only for identification and explanation without intent to infringe.

Cover image copyright © Depositphotos/Rawpixel.

Printed in the United States of America

ISBN: 978-1-5165-1636-0 (pbk) / 978-1-5165-1637-7 (br)



I'd first like to thank Tom Hagley for inviting me to work with him on the third edition of this book. This partnership has been one of the best surprises that life has thrown my way. Tom, I've enjoyed and sincerely appreciated learning from you and working with you. Words can't thank you enough.

My graduate assistant, Scott N. Mitchell, was an invaluable help during this process. Keep writing, smiling, and challenging yourself.

Finally, to my children—Xavier, Jude, and Sydney. You three are the driving force behind all that I strive to accomplish. Thank you now and always for being the fuel to my fire.

— **Rebecca Gilliland**

---

---

I have dedicated this book to my lovely, loving wife, Peggy, whose support through the years contributed so much to the success of my professional career, which is the foundation for this publication. I want to acknowledge the comforting companionship throughout this project from our precious little Cotons de Tulear, Truffles (1996–2009), Woodruff, and Latte.

I am grateful to Rebecca Gilliland for her expertise and diligence in contributing to and carrying forward the knowledge in this book that was developed to advance the PR profession. Her dedicated initiative has given a new and updated perspective to what was started as a course packet and then sharpened by student discussions in 21 upper division PR courses at the University of Oregon.

— **Tom Hagley**

# Contents

---

---

<b>FOREWORD by Glen T. Cameron, PhD</b>	<b>XIII</b>
<b>FOREWORD by Christopher K. Veronda, APR</b>	<b>XV</b>
<b>ABOUT THE AUTHORS</b>	<b>XVII</b>
<b>PREFACE</b>	<b>XXI</b>
<b>HOW TO USE THIS BOOK</b>	<b>XXIII</b>
<b>I: INTRODUCTION TO PUBLIC RELATIONS PLANNING</b>	<b>1</b>
1. Importance of Planning	1
2. Understanding the Planning Process	3
<i>Table 1. Planning Process</i>	4
3. Grasping the Challenges of the Planning Environment	4
<i>Organization</i>	5
<i>Leadership</i>	6
<i>Resources</i>	9
<i>The Plan Developer</i>	10
4. Writing with Integrity	11
5. Writing with Accountability	12
<i>Put Yourself in the Place of a Plan Reviewer</i>	14
6. Writing with Clarity	15
<i>Table 2. Sixteen Controllable Ways to Improve Your Writing</i>	16
<b>II: WRITING PUBLIC RELATIONS PLANS AND PROPOSALS</b>	<b>17</b>
1. The Frog: A Whimsical Story to Introduce Components of a Public Relations Plan	17
1. <i>Problem</i>	18
2. <i>Situation Analysis</i>	18

3. Goal	18
4. Focus or Target	18
5. Objective	18
6. Strategy	18
7. Tactic	18
8. Timeline	19
9. Evaluation	19
10. Budget	19
2. Developing Better Plans	19
<i>Which of the following is a Goal?</i>	21
<i>Which of the Following is an Objective?</i>	21
<i>Which of the Following is a Strategy?</i>	22
3. Ten Components of Public Relations Plans and Proposals	23
1. Introductory Statement	23
2. Situation Analysis	23
3. Goal	23
4. Focus or Target Audience	24
5. Objective	24
6. Strategy	24
7. Activity or Tactic	24
8. Execution Timeline	24
9. Evaluation	24
10. Budget	24
Table 3. Progress Tracking Report	25
4. Creativity in Plan Writing	26
Introductory Statement	26
Situation Analysis	27
Goal	27
Focus	27
Objectives	27
Strategies and Activities or Tactics	28
Evaluating Plans and Proposals	28
5. Questions for Evaluating Some of the Components of a PR Plan	29
6. Student Plan: Promotion of Racial, Ethnic, and Cultural Diversity	30
Problem	30
Situation Analysis	30
Goal	31
Focus or Target Audience(s)	31

7. Model Student Plan Objectives, Strategies, Activities and Evaluations	32
<i>Objective #1: Attract Corporate and/or Professional Interest</i>	32
<i>Objective #2: Increase Graduate Student Awareness of Competitive Research Grants</i>	34
<i>Objective #3: Increase Student Interest in Undergraduate Programs and Resources</i>	35
<i>Objective #4: Increase Community Awareness and Involvement</i>	36
<i>Objective #5: Motivate University Faculty and Staff Support</i>	38
<i>Objective #6: Raise Funding Awareness and Support</i>	39
<i>Execution Timeline</i>	40
8. Model Student Plan Evaluations by Objective	
<i>Estimated Public Relations Agency Budget</i>	44

### **III: RULES FOR WRITING 10 COMPONENTS OF A PUBLIC RELATIONS PLAN** **45**

1. Introductory Statement	45
<i>Rules for Writing an Introductory Statement</i>	46
<i>Example of an Introductory Statement</i>	46
<i>Exercise 1: Introductory Statement</i>	47
2. Situation Analysis	47
<i>Rules for Writing a Situation Analysis</i>	48
<i>Example of a Situation Analysis</i>	48
<i>Exercise 2: Situation Analysis</i>	50
<i>Shelter Association Pursues Housing for The Homeless</i>	50
3. Goal	50
<i>Rules for Writing a Goal</i>	51
<i>Examples of Acceptable and Unacceptable Goals</i>	52
<i>Exercise 3: Goal</i>	54
4. Focus or Target Audience(s)	55
<i>Rules for Writing the Focus of a Plan or Target Audience</i>	55
<i>Example of a Focal Point or Target Audience</i>	56
<i>Exercise 4: Focus or Target Audience</i>	56
5. Objectives	56
<i>Rules for Writing an Objective</i>	57
<i>Examples of Acceptable and Unacceptable Objectives</i>	59
<i>Exercise 5: Objectives</i>	60
<i>Table 4. Three Component Parts of an Objective</i>	61

6. Strategies	62
<i>Rules for Writing a Strategy</i>	63
<i>Examples of Acceptable and Unacceptable Strategies</i>	63
<i>Exercise 6: Strategies</i>	64
<i>Table 5. Factors in Communicating Strategically</i>	65
<i>Table 6. Commonly Known Facts About Persuasion</i>	66
7. Activities (Tactics)	67
<i>Rules for Writing an Activity (or Tactic)</i>	68
<i>Examples of Activities</i>	68
<i>Exercise 7: Activities or Tactics</i>	68
<i>Table 7. Communication Tools</i>	69
8. Execution Timeline	70
<i>Rules for Writing an Execution Timeline</i>	70
<i>Exercise 8: Execution Timeline</i>	71
<i>Example of an Execution Timeline (Table Format)</i>	71
<i>Example of an Execution Timeline (Critical Path Format)</i>	73
9. Evaluation	74
<i>Performance</i>	74
<i>Effectiveness</i>	74
<i>Rules for Writing the Evaluation</i>	75
<i>Exercise 9: Evaluation</i>	75
10. Budgets	76
<i>Rules for Writing a Budget</i>	76
<i>Example of a Budget for a Public Relations Firm</i>	76
<i>Example of a Budget for an Organization or Company</i>	78
<i>Exercise 10: Budget</i>	78

#### **IV. PUBLIC RELATIONS CASE STUDIES 79**

1. Community Relations: Mysterious Sound in Deschambault	79
<i>Learning Outcomes</i>	79
<i>Assignment</i>	80
2. Accountability in Event Planning: Getting Nothing for Something	82
<i>Learning Outcomes</i>	82
<i>Assignment</i>	82
<i>Class Role Play</i>	84

3. Employee Communication: Quality out of Control	86
<i>Learning Outcomes</i>	86
<i>Assess the Audience</i>	86
<i>Assignment</i>	87
<i>Research Findings</i>	87
<i>Business Description: Better Bags Inc., Paperville, U.S.A.</i>	89
4. Media Relations: Charlie Zurlock	89
<i>Learning Outcomes</i>	89
<i>Class Role Play</i>	91
<i>Team Assignment</i>	95
<i>Individual Team Member Assignments</i>	95
<i>Business Description: Custom Parts Company (CPC)</i>	97
5. Crisis Communication: Community Alarmed	98
<i>Learning Outcomes</i>	98
<i>Team Assignment</i>	98
<i>Business Description: Wafermaker</i>	100
<i>Individual Team Member Assignments</i>	101
<i>Additional Notes</i>	103
6. Celebrity Image Building: Superstar Entrepreneur	103
<i>Learning Outcomes</i>	103
<i>Team Assignment</i>	104
<i>Client File Information: Jan Overbrook, Facts and Interview Notes</i>	104
<i>Individual Team Member Assignments</i>	107
7. Community Relations: Contaminated Lagoon	108
<i>Learning Outcomes</i>	108
<i>Introduction</i>	108
<i>Team Assignment</i>	109
<i>Class Role Play</i>	110
<i>Work Schedule and Initial Research Notes</i>	115
8. Social Media: Uncharitable Bloggers	119
<i>Learning Outcomes</i>	119
<i>Charity Description: The Society for Little Children</i>	120
<i>Assignment</i>	121
9. Promotion and Volunteer Recruitment: International Art Exhibit	122
<i>Learning Outcomes</i>	122
<i>Assignment</i>	123
<i>Team Member Assignments</i>	123

<i>Class Role Play</i>	125
<i>Nihonga Classroom Experience</i>	128
<i>Nihonga Art Exhibit Contract</i>	128
<i>Activity Description</i>	130
<i>Nihonga Town Seminars</i>	131
<i>Notes About Nihonga Art</i>	132
<i>Further Research: Volunteer Recruitment</i>	133
10. Empowering Employees: The Bridge	136
<i>Learning Outcomes</i>	136
<i>Business Description: XJS Communication</i>	136
<i>A Conversation between the Authors, Rebecca and Tom</i>	137
<i>Team Assignment</i>	139
11. Public Information: Black Crater Fire	140
<i>Learning Outcomes</i>	140
<i>Assignment</i>	140
<i>Class Role Play</i>	141
<i>Lessons Learned</i>	145
12. Risk Communication: What Could Go Wrong?	149
<i>Learning Outcomes</i>	149
<i>Assignment</i>	149
<i>Additional Notes</i>	150
<i>Class Role Play</i>	151
13. Hospitality Event Planning: IndyCar Racing	159
<i>Learning Outcomes</i>	159
<i>Team Assignment</i>	159
<i>Class Role Play</i>	160
<i>Individual Writing Assignments</i>	164
14. Government Relations: Give and Take Away	165
<i>Learning Outcomes</i>	165
<i>Additional Notes</i>	166
<i>Team Assignment</i>	167
<i>Individual Team Member Assignments</i>	167
<i>Further Research: Ghostwriting</i>	168
15. Public School Emergency Response: Violence at South County High	170
<i>Learning Outcomes</i>	170
<i>Team Assignment</i>	170

<i>Class Role Play</i>	172
<i>Discussion Points: Situation, Crisis, and Risk Communication</i>	178
<i>Individual Writing Assignments</i>	179
16. Community Opposition: Metha-DON'T Put it Here	180
<i>Learning Outcomes</i>	180
<i>Team Assignment</i>	181
<i>Memo: Lighthouse Bay/Methadone Treatment Clinic</i>	183
<i>Class Role Play</i>	184
<i>Individual Team Member Assignments</i>	189
<i>Siting Drug and Alcohol Treatment Programs: Legal Challenges to the NIMBY Syndrome by the U.S. Department of Health</i>	190
<i>Introduction</i>	190
<i>Building the Case: To Site or To Sue</i>	192
<i>Reaching Out to The Community</i>	192
<i>Knowing the Community</i>	193
<i>Cultivating Community Support</i>	193
<i>Carefully Selecting a Site</i>	194
<i>Obtaining Legal Advice</i>	194
<i>Planning a Facility Carefully and Being Prepared To Make Accommodations</i>	195
<i>Educating the Community</i>	195
<i>Demonstrating Willingness To Be Part of The Community</i>	196
<i>Initiating Legal Action</i>	197
<i>Conclusion</i>	197
17. Fundraising: What in the World Would You Like to Share?	198
<i>Learning Outcomes</i>	198
<i>Team Assignment</i>	198
<i>Additional Notes</i>	198
<i>Individual Team Member Assignments</i>	199
18. Corporate Communication: DOWNSIZED!	200
<i>Learning Outcomes</i>	200
<i>Additional Notes</i>	201
<i>Team Assignment</i>	201
<i>Individual Team Member Assignments</i>	201
<i>Class Role Play #1</i>	203
<i>Class Role Play #2</i>	204
<i>PR Director David Maple's Plan</i>	207
<i>Information for Writing Business Rationale</i>	207

<i>Meeting Transcript of Lessons Learned by Others</i>	208
<i>David Maple’s Notes for Writing the News Announcement</i>	212
<i>David Maple’s Notes for Writing Q&amp;A</i>	213
<i>Information for Writing the Q&amp;A</i>	215
<i>Information for Writing Memo to Houston Employees</i>	216
<i>Information for Writing Memo to Distribution Centers</i>	218
<i>Information for Writing Memo from CEO to All Employees</i>	219
19. Marketing Communication: Campus Café	220
<i>Learning Outcomes</i>	220
<i>Additional Notes</i>	221
<i>Team Assignment</i>	221
<i>Individual Team Member Assignments</i>	221
20. Online Community Engagement: Culture of Secrecy	223
<i>Learning Outcomes</i>	223
<i>Team Assignment</i>	224
<i>Class Role Play</i>	225
<i>Tips for Developing the Proposal</i>	229
<i>Additional Resources: Quick Response Codes (QRCs)</i>	230
<b>Index</b>	<b>233</b>

# Foreword

By Glen T. Cameron, PhD

---

---

I was pleased with Tom Hagley’s invitation to provide a foreword to the first edition of his book, *Writing Winning Proposals: Public Relations Cases*, in 2005, and for a second edition in 2009, and now for this third edition in 2017. The pleasure has been in seeing Tom’s continuing resolve to show students how to connect what they learn in class with what will be expected of them in practice.

I first became acquainted with Tom when I was teaching at the University of Georgia, where I schemed whenever possible to get him into my classroom. He was director of public and investor relations for Alumax, a Fortune 200 company located in Atlanta, when he became a favored guest lecturer and internship mentor at the Grady College of Journalism and Mass Communication. In addition to bringing his considerable experience to the classroom, Tom provided the students with structure, guidance, and an opportunity to grow—the same ingredients that make his text a must for our classrooms.

When Tom retired from his distinguished career as an executive in corporate and agency public relations—with a stint running his own PR firm thrown in for good measure—I was teaching at the Missouri School of Journalism. I tried to recruit Tom, knowing that he had spent three decades striving to make the profession better in every way. Tom is committed to embracing innovation as a basis for tempering the metal and sharpening the edge of the profession. Although we competed unsuccessfully with the lures of the Northwest, I feel that we have finally captured Tom by way of his wonderful textbook. It’s not the same thing as having an experienced, compassionate, creative professional in our classroom, but it is the next best thing.

His book is a great piece of work. I say that with respect for its contents, but even more so with respect for the author. *Writing Winning Proposals: Public Relations Cases* comes from a person I always believed was destined to take the “real world” to the classroom. I saw that when Tom spoke to my classes at the University of Georgia and here at the Missouri School of Journalism. He has a passion for teaching, coaching, and counseling. He listens, recognizes, shares, encourages, tolerates, and even admits his own mistakes to those he mentors. His internship assignments made students stretch far beyond what they ever thought they could do with so little experience.

It is no surprise that in this book he insists on writing by the rules to develop winning proposals. He comes to academe knowing precisely what executive managers want from PR practitioners.

**Glen T. Cameron, PhD**

Professor and Maxine Wilson Gregory Chair in Journalism Research,  
Missouri School of Journalism

Professor, Family and Community Medicine and Founder and Co-Director,  
Health Communication Research Center,  
University of Missouri

# Foreword

By Christopher K. Veronda, APR

---

---

Thanks to his book, Tom Hagley is helping to raise the bar in the PR profession. When I started to review the first edition of this book, I couldn't put it down. *Writing Winning Proposals: Public Relations Cases* addresses one of the greatest weaknesses in public relations. I was so pleased to see someone take a bold step not only to define the components of PR plans, but to establish rules for writing them. Tom's clear delineation of how to put a plan together is engaging and the best blueprint I've seen. Students who master the principles in Tom's text will certainly have taken a big step toward being ready to enter the profession.

This third edition of *Writing Winning Proposals: Public Relations Cases* is a great reference and review tool, even for veteran practitioners. In judging hundreds of Silver Anvil Award entries over the years, I noticed that many lacked quality plans. It was common to find goals confused with objectives and strategies combined with objectives. Plans that suffer such deficiencies don't win, or don't even get implemented.

To student readers of Tom's book, I would say you have an opportunity to distinguish yourselves in the profession by learning to write winning plans and proposals, and to stand out from the crowd of professionals, especially by understanding how you build research and evaluation into any plan. I can't emphasize that enough.

There are no secrets to creating winning plans or winning Silver Anvils. If you develop a good plan, you shouldn't be in a position of having to look around afterwards, trying to identify success indicators that might or might not be attributable to PR activities and claiming them to be measurements of success. It seems to me that too many "plans" are written from a shower of communication activities that happen to rain some indicators that could be claimed as results. Your plan or proposal should be like a business contract that puts research, clear objectives, and means of measurement up front. I am excited for people just starting a career who have a big opportunity to write plans worthy of respect and high recognition.

**Christopher K. Veronda, APR**

Director of Corporate Communications (Retired), Eastman Kodak Company  
Former Chairman, Honors & Awards Committee and  
National Board Member, Public Relations Society of America

# About the Authors

---

---

Dr. Rebecca A. Gilliland, Distinguished Professor of Service Learning and Associate Professor of Communication at the University of Indianapolis, joined Thomas R. Hagley, Senior Instructor of Public Relations Retired, University of Oregon, to carry on the invaluable instruction and body of knowledge in his book, *Writing Winning Proposals: Public Relations Cases*, from its publication in 2005 and its second edition in 2009, to this third edition. Dr. Gilliland has reviewed, revised, and given a new and updated perspective to what started as a course packet developed from Tom Hagley's instruction sharpened from close attention to student learning in 21 advanced classes in Public Relations Plans and Problems that he taught at the University of Oregon.

This book is the only PR case text with specific instructions for writing winning PR proposals and plans. A unique aspect of the text is that it has been written entirely from a client–employer perspective to show students how to give clients and employers what they want in a plan, the way they want it. Tom Hagley, with his critical analysis from 30 years in practice, has challenged the profession to consider improvements in PR plan writing that would be welcomed by plan reviewers and enhance the reputation of PR practitioners.

In the third edition, Dr. Gilliland, based on her expertise in PR education and pedagogy, complements this perspective by adding details to enable students to translate what they are currently learning in the classroom to the language spoken, and best understood, by clients. Her experience in advising more than 80 client campaigns in a successful student-run PR firm fosters this translation, while preserving the foundation and uniqueness of the previous texts' editions—the client-centered approach that will catapult students to an understanding of industry needs, beyond any other textbook.

*Writing Winning Proposals: Public Relations Cases* gives instructors and students a broad range of choices of diverse cases to study in online community engagement, media, government relations; employee empowerment, crisis, risk, corporate, emergency service, and social media communication; and sports, arts, green, and celebrity promotional event planning. It is a PR case textbook that motivates students to work in teams and develop PR plans and proposals, knowing that their problem solving is with recurring situations that they are likely to encounter as they enter the profession. This strategy-based approach will begin to cognitively train successful practitioners rather than simply

feed them information. Moreover, the authors feel strongly that it is quite possible to teach students the necessary information, yet afford them the opportunity to understand that clients—those who are often not formally trained in public relations—need the same information from a different perspective, so that they may best appreciate the benefits of the practice of public relations, and of PR practitioners.

## **Rebecca A. Gilliland, EdD, APR**



Dr. Rebecca Gilliland, EdD, APR, is the Distinguished Professor of Service Learning and a tenured Associate Professor in the Department of Communication at the University of Indianapolis (UIndy). She has taught courses at UIndy in personal branding, PR principles, PR case studies, writing for public relations, and public speaking. In addition, she advises UIndy's chapter of Public Relations Student Society of America (PRSSA), and the student-run PR firm, Top Dog Communication (TDC).

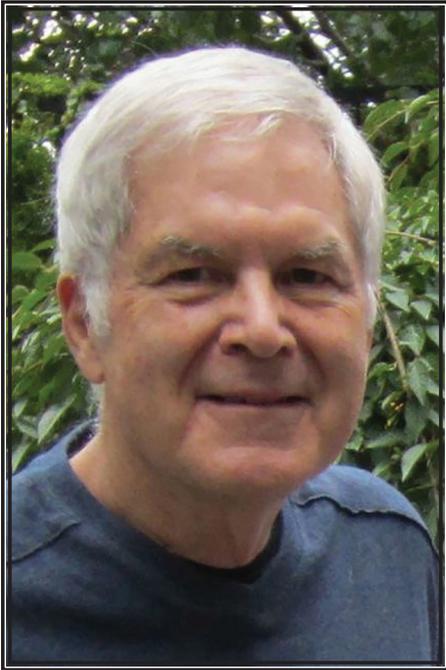
Rebecca's expertise in the area of service learning and student-run PR firms has produced both national and international recognition. She diligently restructured TDC to foster student learning and to produce positive client outcomes. TDC now works to instruct students through real-world experience as students lead and implement pro bono campaigns for nonprofit organizations in the Indianapolis area and beyond. This work includes visioning and implementing full strategic plans, culminating in tactical completion to bring the respective campaigns to fruition.

To date, TDC has initiated campaigns for more than 80 nonprofit clients. Rebecca's dedication to excellence and her students' passion for success has resulted in numerous awards and recognitions for the program. PRSSA named TDC as the Teahan Outstanding Student-Run Firm of the Year in both 2011 and 2013. TDC has also received numerous Pinnacle Awards from the Hoosier chapter of the Public Relations Society of America (PRSA).

Rebecca has been invited to present at conferences and symposiums across the globe, providing strong foundations and careful elaboration on topics like curriculum development, student-run PR agencies, service learning, and evaluative measures. She has shared her knowledge through instruction as a visiting professor at Pepperdine University in California and Auckland University of Technology (AUT) in New Zealand, and has presented to several PR professional organizations worldwide, including PRSA, the Public Relations Institute of Australia, and the Public Relations Institute of New Zealand. She was named a Plank Scholar and worked for the executive team of Sprint. She is also a Fulbright Specialist, having spent time mentoring faculty, visiting PR firms, and teaching at AUT.

She has held jobs in public relations, journalism, and communication for several companies and organizations, including internationally, and has achieved the status of "Accredited in Public Relations." Rebecca holds a doctorate in higher education with a double cognate in communication studies and public relations, and a MA in communication studies. She completed her BA in psychology with a minor in business administration while also competing as a student athlete.

## Thomas R. Hagley Sr.



Thomas R. Hagley is Senior Instructor of Public Relations Retired at the University of Oregon School of Journalism and Communication. He is a recipient of the school's Jonathan Marshall Award for innovative teaching in journalism and communication. Tom joined the Oregon faculty full time in 2001. He taught 51 classes in J350 PR principles, J440 (J351) PR Writing, J453/J553 PR Planning and Problems, J452/J552 Advanced PR Writing, J454/J554 PR Campaigns, and J610 Crisis Communication to an enrollment of more than 1,000 students during a 10-year second career.

Tom has a MS and BS in journalism from Ohio University. He is a member of Kappa Tau Alpha, the college honor society that recognizes academic excellence and promotes scholarship in journalism and mass communication. His work as an educator was preceded by 30 years of progressive professional experience as a general assignment reporter with *The Cleveland Plain Dealer*, as publications editor with Newport News Shipbuilding & Dry Dock Co., as an executive with Alcoa, (Aluminum Company of America), Hill and Knowlton, Inc., his own consulting firm, and Alumax,

Inc. Tom is the consummate professional with an extraordinary range of perspectives “from all sides of the desk”—as a client served by worldwide PR agencies; as a worldwide agency executive serving international clients; as a corporate executive managing staffs and annual program budgets of \$6.5 million, including title sponsorship of an IndyCar racing team and corporate philanthropic annual contributions of \$10 million; as director of public and investor relations throughout the spin-off of a subsidiary from AMAX Inc., to its formation as a public entity, Alumax Inc., during a takeover attempt by Kaiser Aluminum, and ultimately through the acquisition of Alumax Inc. by Alcoa in 1998, which formed, at the time, the world's largest aluminum producer.

He is a master of all forms of PR writing, including PR plans, congressional testimony, and executive speeches; a white paper used by the office of the U.S. Trade Representative as the base document in negotiations which resulted in the resolution of an international trade crisis; and persuasive documents, such as a federal grant proposal totaling \$1.25 million awarded to a public school district for before- and after-school programs. Tom is author of articles published in business and professional journals, including seven featured in *The Strategist* magazine published by the Public Relations Society of America.

# Preface

---

---

This book is about showing you how to excel in public relations. As coauthors, Tom and Rebecca have combined the very best of their backgrounds to coach you in making a successful transition from class to practice in ways that benefit you and the profession.

Consider this: As a PR plan developer, you are in a unique position because so much of what happens in practice begins with a plan or proposal. The quality you write into plans and proposals distinguishes you as a skilled practitioner and enhances the profession's reputation. Making improvements in plan writing is a challenge because routines like writing plans become institutionalized and those involved become resistant to change. But we will show you the way to do it, give you a model, work with you as you learn, and build your confidence to continue on your own.

We will show you that the approach to plan writing is most effective and fun when it's done as a collaboration of knowledge and a meshing of working relationships, much more so than as a competition just to win clients and awards.

What distinguishes this book is that its instruction is presented from the perspective of those who review PR plans and communication proposals and authorize the resources necessary for their implementation. In short, it tells specifically what plan reviewers—typically clients or decision makers in a company or organization—want to see in a plan and how they want the information to be presented.

With this book, you will have the opportunity to practice writing plans and proposals to solve problems, seize opportunities, and meet challenges in diverse, real world cases. The cases are representative of what you can expect to be working on when you step into practice.

Use of the cases as teaching resources has been classroom tested to be effective in more than 20 university-level PR plan writing classes.

Something in your interest brought you to this book. Hopefully, you find its worth in showing you how to develop plans with a potential for success.

# How to Use This Book

---

---

This book is organized into four sections. The first one provides an introduction to public relations planning.

The second section focuses on writing PR plans and proposals. The third section provides new fundamentals and rules for writing PR plans and proposals that can exceed the profession's ability to win clients and employer approvals. It gives a clear picture of the profession's dire need for better plan and proposal writing and how to give clients and employers what they want in plans, the way they want it.

The fourth section presents 20 cases needing, but not providing, solutions. Each case includes learning outcomes as a guide in studying the case and planning solutions. As in the real world, solutions are up to you as a PR plan developer. Each case includes writing assignments for what might be included as tactics in a plan, such as a press statement or talking points. Many cases include a role play in which class colleagues can read from a script and together act out a key part of a case.

A class can take on a single case in four- or five-member teams with the task of developing plans and having each team member choose a different writing assignment following the case. Or teams can take on different cases, depending on the length of the term, depth of assignments, and administrative capabilities.

Teams can present the cases in class, and even in team competition for the best written plan. The cases are real, but the identities of people, companies, and organizations have been obscured to provide the unvarnished truth in all situations.

This book, with its uniquely diverse content, has application by instructors as a resource throughout an entire PR course sequence. For example, for an introduction to PR course, case examples can give students an insightful view of real situations that challenge PR practitioners as they enter the profession. For a PR writing course, the text provides more than 80 writing assignments related to actual case situations. For a PR plans course, the text provides the ultimate instruction with rules for writing the components of a plan. The text gives students opportunities to organize and function in teams, to divide work, to write and present plans that give employers and clients what they want, the way they want it. For PR campaigns courses, the text gives teams guidance in writing plans with the potential to delight actual clients and win awards. Overall, the text is a timeless, invaluable, desk reference for public relations practitioners.

# I: Introduction to Public Relations Planning

---

---

## 1. Importance of Planning

Why is it important to learn how to write public relations proposals or plans? Here are three reasons:

One reason is that a plan is the instrument used to propose and obtain approval for executing PR activities. Executive managers who have responsibility for allocating an organization's resources require various methods, such as a traditional business Request for Authorization, that provide a basis for evaluating expenditures. In similar fashion, a PR plan serves as a proposal to spend a certain amount of an organization's time and money on PR activities. The 10 components of a plan provide the information necessary for managers to evaluate proposed PR activities and approve their execution.

Another reason it is important to learn how to write a PR plan is that a plan provides a mechanism for measuring results of PR activities. A good plan provides objectives with measurable outcomes. This provides plan reviewers with evidence that a plan is making progress toward achieving the plan's goal. It also provides a sound basis for evaluating the results of a plan and educating reviewers about the power of public relations.

Another reason it is important to learn how to write a PR plan is that a plan is a product, the quality of which can distinguish its developer as a star among practitioners of all levels of experience. This is because the quality of PR plans throughout the industry leaves so much room for improvement that well-conceived plans easily take on a brilliance that wins approvals and adds credibility to the profession.

Communication professionals who serve as judges for the industry's most prestigious award competition, the Silver Anvil, sponsored each year by the Public Relations Society of America, review hundreds of PR plan entries. Judges are outspoken in saying that many industry professionals need to go back and learn the basics of developing successful PR plans. The criticism is leveled at all but the few plans selected for recognition.

**It is important to learn how to write a PR plan because a plan is the instrument used to propose and obtain approvals, it is a mechanism for**

## **monitoring and evaluating, and it is a product that distinguishes true PR professionals.**

To fully appreciate how planning relates to public relations, it is necessary to know precisely what public relations is and what can be expected of its practice. There are hundreds of definitions of public relations, some short, most beyond conversational. You will want to settle on one or create your own—one that is memorable and fits comfortably into a conversation.

Challenge yourself to define public relations in two words. Other professions define themselves in two words—doctors practice medicine, lawyers practice law, accountants keep records. People in these disciplines define their work in two words, issue invoices, and get paid accordingly for their expertise.

Not everyone in public relations can receive compensation so readily for their work because many people—yes, many people—in public relations cannot define what they do. And if you can't define what you do, you can't measure what you do. If you can't measure what you do, you can't evaluate what you do. If you can't evaluate what you do, no one will pay for what you do.

To arrive at a two-word definition of public relations, make a list of PR projects and programs and you will see that they were designed to convince people to support, to vote, to consider, to learn, to champion, to follow, to testify, to read, to buy, to trust, to invest, to listen, to become informed, to join, to leave alone, to contribute, to believe, to participate, to think, to work, to authorize, to accept, to welcome, to compromise, to accommodate, to cooperate, to wait, to attend, to decide, and the list will go on and on and on. The common denominator, the two-word definition, becomes perfectly clear. That is, in public relations, we influence behavior. Whose behavior do we influence? The answer for a public corporation, for a private company, and for a nonprofit organization is the same. We influence the behavior of anyone who has or could have an effect—positive or negative—on the organization's ultimate performance and well-being.

That would include, as examples, employees, suppliers, customers, shareholders, industry and financial analysts, labor unions, voters, government regulators, media, special interest groups, and many more.

Is that ethical? Of course it's ethical. The ethical principles applied to public relations are no different than those applied to any other profession. Is it ethical to persuade someone to replace a heart, a tooth, a roof, or a brake cylinder? Certainly it's ethical if something does, in fact, need to be replaced.

How do we influence behavior? We influence behavior through strategic planning and communication. And therein lies the “magic of the profession” that few PR practitioners possess and for which fewer still get proper recognition.

True expertise in strategic planning and communication is the work of masters. That's why you can call it the “magic of the profession.” Strategic communication requires knowledge, skills and problem-solving experience in the dynamics of persuasion, human interaction, and communication design.

In public relations, we influence behavior through strategic planning and communication. We define strategic communication as having five characteristics:

1. Skillfully planned and managed
2. Transmission and receipt of information
3. Authoritative
4. Targeted at individuals or groups
5. Specifically designed to influence behavior

How do we evaluate the effectiveness of our strategic planning and communication? The answer, simply: Did we influence behavior or not?

Public relations can be defined as the practice of influencing behavior through strategic planning and communication. Planning is the central function in this process.

## 2. Understanding the Planning Process

Consider that public relations is the practice of influencing behavior and that planning is the method by which behavior is to be influenced. A plan focuses on a problem, challenge, or opportunity that would significantly benefit its sponsoring individual or organization. The subject of a plan could be the result of an organization's initiative or could arise as a result of circumstances beyond the organization's control. In either case, a plan is required to deal with the subject and derive benefits for its sponsor.

Planning begins with gathering information: first, to understand the problem, challenge, or opportunity; second, to develop ways to accomplish the plan's goal, and third, to track and measure effectiveness in achieving the plan's goal. Planning efforts are likely to fail if the task is approached single-handedly, because effective planning requires a range of knowledge, and information gathering requires gaining the cooperation of many different sources.

One source of information, of course, is yourself, the PR plan developer—and the knowledge you have acquired from study and experience. Depending on the subject of your plan, you also will look within your organization to draw on the knowledge skills and backgrounds of other individuals. They can provide onsite, in-house expertise in law, marketing, product development, finance, sales, human resources, engineering, technology, and other professional disciplines.

You will look to information sources outside your organization, such as industry trade associations, government agencies, nongovernment organizations, and professional and service organizations, and you will tap other sources around the globe through the Internet. Gaps in information will have to be filled and assumptions validated through informal (qualitative) or formal (quantitative) research that you recommend in the plan or conduct for development of a plan.

The information you gather must be assessed and funneled into development of the plan's situation analysis. From the analysis you should be able to (a) write a statement summarizing the problem, challenge, or opportunity; (b) establish a goal with compelling reasons for taking PR actions to achieve it; (c) decide what must be done to accomplish the goal, which is the role of objectives; (d) determine the primary focus or target audiences of the plan—people whose behaviors must be influenced to accomplish the plan's objectives; and (e) develop strategies with detailed activities to show how the plan's objectives are to be achieved.

The process of strategically influencing the behavior of individuals or groups of individuals must take into account all dimensions of communication. The process requires careful development of what is to be communicated, selection of channels through which messages are to be conveyed, consideration for how the communication might become obstructed and/or filtered, and regard for how messages will be received by the intended audience, depending on its disposition toward the message and its source.

A plan developer must decide how much of this process can be based on professional experience and intuition and how much should be based on formal or informal research. Another important part of the planning process is providing methods of evaluation for tracking and gauging a plan's implementation, such as use of a regular Progress Tracking Report.

The planning process includes development of a timeline that provides an at-a-glance view of major preparatory steps, deadlines, and milestones leading to achievement of the plan's goal. Finally, a plan provides an estimated budget for its implementation.

The process is complex, but it is an exciting challenge for people who enjoy problem solving, gathering information, investigating, researching, interviewing sources, applying lessons in human behavior, and orchestrating it all into a plan.

*Table 1. Planning Process*

Introductory Statement Problem ~ Opportunity ~ Challenge		
Situation Analysis		
Goal		
Target Audience 	Target Audience 	Target Audience 
Objective(s)	Objective(s)	Objective(s)
Strategies	Strategies	Strategies
Activities (or Tactics)	Activities (or Tactics)	Activities (or Tactics)
Evaluation	Evaluation	Evaluation
Progress Tracking Report		
Execution Timeline		
Budget		

### 3. Grasping the Challenges of the Planning Environment

Public relations plans are developed in many different environments—publicly owned and privately owned companies, government and nongovernment organizations, and nonprofit and various other entities. These environments have characteristics that can have a bearing on how plans are developed; whether plans are approved, modified, or rejected; and even whether plans succeed or fail. So planning

cannot be done in a vacuum. Planners must take into account the characteristics of their respective organizations, which will enable them to understand how to meet the challenges of the planning environment.

Let's take a look at major challenges of the planning environment relative to an organization, to leadership, to resources and to the expertise of the PR plan developer.

## *Organization*

A publicly owned corporation, for example, can be mission driven or financially driven. Organizations, of course, can and do fall somewhere between these aims, but for our purposes we will look at these as points on opposite ends of the spectrum.

In a mission-driven organization, employees are considered the key to success. When employees are motivated by meaningful work, they invest more than their time in an organization. They work with a purpose that captures their interest and taps their creativity as they reach out to customers with innovative solutions and extraordinary service. By building relationships with customers, an organization grows in sales, profit, market share, and, ultimately, in overall value to its shareholders. In a mission-driven organization, management is interested in investing in PR plans that

- motivate and empower employees to provide innovative, superior service to customers;
- win the loyalty of suppliers;
- build long-term working relationships with all stakeholders; and
- strengthen the bottom line in terms of economic performance, social investment, community involvement, ethical performance, and environment values.

In a mission-driven organization, a plan developer is in competition for resources with other areas, such as operations, marketing, sales, customer service, and research and development. The allocation of resources is evaluated in terms of the organization's mission, rather than short-term financial goals. Management reviews plans for their potential to benefit all stakeholders. The focus is on investing for the longer term.

In a financially driven organization, management tends to take employees for granted and simply goes through the motions of showing respect for other stakeholders. The serious interest is in impressing securities analysts and shareholders with short-term performance improvements—quarterly profits. The focus on profits can be so intense that management will do whatever it takes—acquire this, sell that, lay people off, cut back, borrow more—to obtain an attractive stock price.

Developing a PR plan in a financially driven organization can be a challenge because management in many cases will be inclined to resist plans that

- don't yield an immediate, virtually guaranteed return;
- propose costly benchmarking or other investigative and evaluative research measures;
- require an investment in the long term for building relationships with any of the organization's stakeholders;

- have strategies requiring consistent values, such as telling the whole truth internally and externally and not spooning it out according to the differing tastes of stakeholder groups; or
- offer effective solutions but require added costs of using outside services, such as photographers, graphic designers, multimedia studios, and PR firms.

## *Leadership*

Let's look next at the challenges of the planning environment in the area of leadership. Approval of PR plans is, in large part, under the control of executives who have no academic education in public relations. This paradox deserves a deeper look.

Next to the ability to manage people and budgets, PR skill is the most sought-after attribute in top executives by today's corporations, according to private research by a worldwide human resources organization. Yet few executives have any formal education in public relations and slow progress is being made to equip future business leaders with these critical skills.

Business schools develop leaders for businesses that operate throughout the world. What these leaders are taught has an influence on the daily lives of millions of people—an enormous responsibility that business schools try to address but typically only with the traditional focus on finance, accounting, and marketing.

Examine the dramatic transformation taking place in the role of chief executive officer and one can easily surmise that market demand for formal PR training should be heading toward academe like a high-speed train. Executive leadership today is about building and maintaining trusting relationships with employees, customers, suppliers, investors, analysts, board members, and all major stakeholder groups. It's about influencing the behavior of people through persuasive, strategic communication. It's about showing empathy for others. In sum, it's about public relations. In recessionary times, especially, building relationships with compassion and open, candid communication is imperative for today's business leaders. These core values are critical to corporate America's struggle through traumatic upheavals marked by acquisitions, mergers, downsizings, and restructurings that are leaving employees with feelings of instability, insecurity, and uncertainty about their work and personal lives. More business schools are going to have to expand functional areas with formal PR training.

Meanwhile, living up to public expectations of good corporate behavior remains a continuing challenge for corporation after corporation. The problem sometimes is the character of the CEO. It has been said that CEOs are hired for their skills and fired for their personalities. Sometimes the problem is the CEO who has no formal PR training.

For example, in 1989, millions of gallons of oil spilled from the ill-fated Valdez oil tanker into pristine Prince William Sound. The corporate giant, Exxon, was at fault. At the time, it was the third largest corporation in sales in the world. This oil spill is still considered one of the most, if not the most, devastating environmental disasters caused by humans of all time. As many as 250,000 seabirds, more than 2,000 sea otters, and hundreds of other animals, including bald eagles and orcas, died. The chairman of Exxon at the time, Lawrence Rawl, said jokingly, "We would have liked to recall the oil off Prince William Sound. We called, but it didn't hear us." Exxon, in its corporate arrogance, later brought the Valdez back to Alaska to operate, which served to rekindle memories of great loss and destruction.

Public relations textbooks always have a supply of updated cases of corporate leaders failing to live up to public expectations of trust, compassion, and good citizenship.

For example, Boeing CEO Jim McNerney apologized in a company-wide message for telling analysts that he won't retire after turning 65 because "the heart will still be beating, the employees will still be cowering."

During an event focused on women in technology, Microsoft CEO Satya Nadella blundered into saying women shouldn't ask for raises but rather trust that the system will take care of them.

Martin Shkreli, a hedge fund manager-turned-pharmaceutical CEO raised the price of the antiparasite medication Daraprim from \$13.50 a pill to \$750 because his company "need[ed] to turn a profit on the drug." This particular drug is named by the World Health Organization as "essential medicine" and is used for life-threatening diseases.

Volkswagen CEO Martin Winterkorn said, "I am endlessly sorry ..." about VW installing elaborate software in 482,000 "clean diesel" vehicles sold in the United States, so that the cars' pollution controls only worked when being tested for emissions. The rest of the time, the vehicles could freely spew hazardous, smog-forming compounds.

Let's consider what can happen, practically speaking, when a CEO has to manage a crisis situation. Without formal training in public relations, a CEO has no basis on which to make self-confident decisions and instead must rely heavily on the advice of others.

In a crisis situation, a CEO often turns to corporate counsel for legal advice. However, some attorneys can be so intimidating about liability issues that they paralyze a CEO into a state of inaction. With solid PR training to balance legal counsel, a CEO might, as one did, say in a crisis situation: "I've been advised by our law department that the company is not responsible, but we are going to act as though we are."

Or a CEO could hire a PR firm with a track record in successful crisis management, but the CEO without PR training could be putting the fate of an entire enterprise into the hands of experts the CEO has little or no skills to evaluate or direct.

Or a CEO could turn to what Warren Buffett calls the "institutional imperative," or the tendency of executives, he says, "... to mindlessly imitate the behavior of their peers, no matter how foolish it may be to do so."

We will continue to see major corporations failing to live up to public expectations of corporate citizenship until the top jobs are filled with executives who have the formal training necessary to feel self-confident in directing the PR function, building trusting relationships through good communication, and leading with compassion.

Developers of PR plans will continue to be challenged to educate senior executives in the practice of public relations. We know that the profession operates on a body of knowledge in the social sciences that has been developed over many years. We practitioners know how to put that experience to work in all areas of public relations. Many executives have yet to learn even the fundamentals of influencing behavior.

Some plan developers are fortunate to have chief executives who are better educated in public relations and the body of knowledge that supports its practice. These enlightened executives enjoy working with plan developers. A plan developer can show a CEO, for example, that by understanding and participating in the creative process, the chief executive can have visions that trigger in all stakeholder groups the conviction to act in support of an organization's mission.

In a *Business Week* article from early 2003, Jeffrey E. Garten, dean of the Yale School of Management, wrote this timeless advice: "Industry can't climb out of its funk just by cutting costs and meeting quarterly goals. CEOs must bet on their vision." Betting on a vision is a risk that many CEOs are hesitant to take. Some prefer to play it safe, managing costs and fine-tuning strategies. Some

prefer to mark time, waiting for economic circumstances to improve. Some have promising visions, but lack confidence in their ability to carry them out.

Launching a vision is like launching a ship. If you don't know how to score the champagne bottle so it will break against the ship's hull at the christening ceremony, the result could be an embarrassing clunk, instead of a spectacular splash. In other words, if you don't know how to launch a vision, you could end up with an embarrassing disappointment rather than a shower of accolades.

Let's consider what it is like to launch a vision with a leader who understands the principles of influencing behavior. First, the leader holds someone accountable for developing the vision. The person held responsible is usually a professional communicator, such as the plan developer. Some executives believe that planting a seed with an individual is the same as assigning an individual to the seed's development. It's a safe position for the executive who doesn't want to take the risk of sharing an idea and possibly being challenged, debated, or criticized about its potential or validity. But there's a big difference between sowing a seed and holding someone accountable for the seed's growth and development. Without a process for development and accountability for driving it, a vision will be no more than a pipedream.

There is no inherent certainty that what a leader has in mind as a vision, especially in its embryonic state, is clearly right for the organization. Executives must have the courage to engage in constructive debate. Open, on-going dialogue with others serves to clarify and perfect a vision. A plan developer shows a leader how to share a vision with others, perhaps in a small brainstorming group or among confidants. The developer knows visionary ideas are fragile. They're not complete. They're not perfect.

A plan developer knows how to shepherd delicate ideas through the creative process, and how to pursue all of the pathways of human engineering necessary to energize the interest and action of individuals who have a potential stake in the organization's success. A plan developer is quick to point out that a vision is not a directive. It's not a figment of someone's imagination. It must be an achievable condition, an irresistible state of being with the power to turn belief in an idea into a conviction to act on its behalf.

An enlightened leader will work closely with a plan developer, knowing that conveying an idea is difficult and requires a variety of professional communication skills. A leader can turn to a plan developer for the draft of a vision the same way the executive turns to a writer to request a draft of a speech.

The leader and plan developer know the aim of a vision shouldn't be to shoot for the moon. Its aim should be to orchestrate readily available resources to achieve results that move an organization to a higher level of innovation, competitive strength, market position, and profitability. An experienced PR plan developer has the position and skills to move freely throughout an organization to expose an idea to a broad spectrum of expertise in sales, marketing, law, finance, and research and development, and to meld ideas into a vision with universal appeal.

The leader and plan developer know that a vision must contain appeals to all stakeholders—employees, existing and potential investors, industry analysts, bankers, journalists. Enlightened executives know that to have the power to trigger convictions to act, a vision must have ownership by all of its stakeholders. It is not a one-sided opportunity. It must be a multifaceted, irresistible opportunity for stakeholders within and outside the organization. No one in an organization has a better grasp of the diverse views of stakeholder groups than an organization's experienced PR professional. Research is a cornerstone of the profession and PR professionals who perform the function in developing annual reports, establishing websites, preparing news announcements, and drafting speeches, position papers, and other forms of corporate communication are well equipped with the skills to research and develop the basis for a vision.

An astute leader knows that once crafted, a vision must be delivered, but not by a “town crier.” It’s not an edict. It’s a vision. It’s the seed of an idea. It needs time to unleash its power in the imaginations of people it captivates. It needs time to be considered, studied, and evaluated.

As a vision is pursued by the chief executive and plan developer and evidence of its potential develops and is shared with its stakeholders, a vision gains validity. It is assimilated and communicated with personal conviction by its stakeholders. Results of the vision continue to validate its potential and trigger in the minds of its stakeholders the conviction to act in support of the vision. As the process unfolds, it energizes employees to produce, customers to buy, investors to invest, bankers to lend, analysts to recommend, journalists to write, and suppliers to support.

For PR plan developers who are fortunate to have chief executives who are enlightened and willing to explore what can be accomplished by leveraging the credibility of public relations in a vision, the challenge to planning can be an exciting experience.

## *Resources*

Let’s look next at the challenges of the planning environment in the area of resources. The plan developer might have a choice of using resources within the organization or outsourcing work to various service firms. Or the plan developer might have to rely entirely on the organization’s resources. The advantages of using the organization’s resources are that

- people involved have a vested interest in the organization’s mission and are likely to have a better understanding and a personal commitment to contributing to its success;
- control of the plan is internal among the people involved with its implementation; and
- expenses are minimized by enlisting the involvement of existing personnel and obtaining support from existing budgets.

The planning challenge increases when the plan developer must outsource work. A plan developer might not have a choice other than to outsource work to a firm already retained by the organization. Whether the developer must use a designated source or select a source, careful management of the source’s performance is essential. To illustrate, let’s consider what is involved in managing the outsourcing of work to a PR firm.

Generally speaking, PR firms are service driven. However, some PR firms are cost driven. Unless one is prepared to lose one’s shirt, it’s best to select a service-driven firm.

By selecting a service-driven firm, a plan developer is far more likely to develop and execute a winning plan.

So how might one distinguish a service-driven from a cost-driven PR firm?

Use of time is a major distinguishing factor. A service-driven firm uses time to provide service. A cost-driven firm uses time to cover costs at the expense of client service. Firms become cost driven when the cost of operating—office rent, vehicle and electronic equipment leases, salaries, and other overhead—is so high that meeting those expenses drives the business.

A service-driven firm provides a plan developer with an experienced account representative. A cost-driven firm provides an experienced account representative, initially, then might switch to a less experienced representative, but at the same high billable rate.

A service-driven firm provides a plan developer with the full depth of the firm’s expertise. A cost-driven firm limits client service to the experience of the account representative, allowing others in the firm to concentrate on more lucrative business.

A service-driven firm provides a plan developer with high-quality resources for graphic design, photography, video production, and whatever else is needed. A cost-driven firm attempts to use its own, often mediocre resources to keep profits in house.

A service-driven firm drives the plan developer's assignment to completion. A cost-driven firm is less responsive, causing the client to do the account representative's work of staying on schedule and on budget, enabling the account representative, instead, to handle more accounts.

A service-driven firm is willing to tailor its services to a plan developer's own performance criteria. A cost-driven firm insists on its own way of providing service and resists client attempts to manage and evaluate the firm's performance.

A service-driven firm knows how to serve as an extension of a plan developer's staff. A cost-driven firm keeps its independence and functions to its own advantage.

A service-driven firm keeps working until the work meets the plan developer's expectations. A cost-driven firm is in a hurry to collect its fee. It offers excuses for substandard work and sometimes tries to get the client to accept and pay for the PR firm's mistakes, inability to follow directions, poor writing, careless editing, and other unprofessional practices.

To manage a plan that will involve the services of an outside firm, a plan developer must understand the challenges involved in outsourcing and directing various forms of services.

A plan cannot be developed or implemented in a vacuum. The environment in which a plan is developed can present substantial challenges in the areas of organization, leadership, resources, and plan developer expertise.

## *The Plan Developer*

There is one more factor to consider—the PR plan developer. Acceptance of plans that you propose will depend, in large part, on plan reviewers' confidence in your ability to deliver what you propose. Such confidence comes from how reviewers see you as a PR practitioner. So let's consider the matter of professional image.

The traditional characterization of PR professionals suggests that practitioners fall somewhere on a continuum ranging from lower-paid technicians to higher-paid consultants and that the ultimate career position is having the stature necessary to gain acceptance by the leadership of an organization. This characterization suggests that practitioners have a choice to make between being a technician or a consultant, and that if an individual chooses to be a technician, such as a newsletter editor, the individual will not have the esteem of a consultant in the eyes of senior executives.

Here's a different view. Some of the most effective practitioners use unique combinations of technical skills and consulting talents. Practitioners, through their academic training and education and professional experience, develop a professional capability comprising both technical and consulting skills. These practitioners have the ability to confer on situations, from simple to complex, and recommend ways to influence people—even millions of people—to behave one way or another in response to meaningful communication activities. They have the consulting skills to recommend communication strategies and, in addition, all of the technical skills to use communication tools, such as a news announcement, guide it through the review process, reconcile reviewers' differences, disseminate the announcement worldwide, and handle resulting inquiries from reporters, providing more information and/or effectively correcting erroneous reporting errors. A skilled practitioner has the consulting skills to recommend strategic use of online media and the technical know-how to create projects in the cyberworld.

The combination of consulting and technical skills is a great strength. However, young practitioners need to be conscious of the image they project—someone who scurries around with a pencil behind one ear, clutching a clipboard, and dangling a camera from a neck strap is going to have a difficult time being regarded as a counselor rather than a technician. So if you don't want to be seen as a mechanic, don't carry a big wrench.

Young practitioners entering the profession should take delight in acquiring a combination of technical and consulting skills, and enjoy developing that unique professional capability to the fullest extent possible.

## 4. Writing with Integrity

A student at the University of Oregon was asked in a job interview to identify weaknesses in the PR profession. Unable to think of any off hand, she turned to the interviewer who admitted that she couldn't think of any either. Understandably, we don't dwell on our weaknesses. However, public relations, as an evolving profession, does have vulnerabilities. Practitioners, and particularly plan developers, have a responsibility to be aware of them and to help ensure that public relations continues to grow in practice and in character.

What can we do as plan developers to strengthen the profession? One thing we can do is market and deliver what we do best. We are strategic communicators. A review of Silver Anvil winners in the category of PR tactics showcases the tremendous talent we have in communication.

Public relations is not clearly defined—it has hundreds of definitions, so expectations of results can be wide ranging. It is better to market our core competencies in communication than to promise more than we can deliver. The temptation exists to pursue hot markets with loosely formed but firmly hyped expertise, such as reputation integration, awareness leveraging, brand amplification, content control, blogger outreach, social media management, influencer marketing, and digital market penetration. This tendency oftentimes sets up great expectations among clients, only to be dashed by disappointing results and invoices that make boards of directors resistant to return to the profession for services.

Another thing we can do is bring PR planning into sharper focus, as we strive to do in the classroom and in this book. Because there is limited textbook instruction in developing PR plans, practitioners have almost as many different definitions of goals, objectives, strategies, and activities as there are for defining the profession itself. A PR plan that puts its audience into a state of glazed-over confusion over terms and form brings great injury to the profession's reputation.

Public relations is not an exact science, so we cannot guarantee the outcomes of plans. We can, however, show how we draw on bodies of knowledge in the social sciences and methodically and strategically formulate plans to increase our effectiveness in achieving objectives.

We can also strengthen the profession by ensuring that our practice of public relations is always service driven. Examples exist of PR firms whose overhead costs for expensive office space, furniture, office equipment, and leased cars—instead of quality service—drive the practice, demanding more and more billable hours any way a firm can get them. There are examples of individual practitioners whose work is driven by personal ambitions at any cost, rather than by a genuine desire to provide quality service. These reflections are amplified by popular media, making a true understanding and appreciation of the practice of public relations even more difficult. The profession's reputation cannot afford further missteps, any more than today's corporations can afford their respective tarnishing due to the liberties many have taken with accounting practices.

Being rock solid in upholding the principles of the profession, as enumerated in the Public Relations Society of America's Code of Ethics, is especially important at a time when public relations is heavily engaged in counseling others about reputation management. Public relations has yet to be fully accepted as a true profession. There are no standardized educational requirements. There is no mandatory licensing or certification. There is no effective self-regulation.

When we market our core competencies in strategic communication, when we bring PR planning into sharper focus, when we ensure that our practice of public relations is service driven, we are leading with integrity. We are demonstrating a passion for principles that command respect and develop mutual trust. By leading and writing with integrity, we enable the profession to grow in practice and in stature.

## 5. Writing with Accountability

It is easy to get caught up in the excitement of developing a PR plan, especially if you believe its creative elements will delight or impress reviewers. However, telling reviewers that a plan is cool, awesome, fleek (excellent) or G.O.A.T. (Greatest Of All Time), could be a serious miscalculation on the part of a PR plan presenter. That's because a plan, regardless of its degree of creativity, must be backed by accountability for cost, completeness, effectiveness, and measurability.

To feel what it's like being held accountable by a plan reviewer, read the following conversation between a PR plan developer and a potential client.

**Potential Client:** *Let's cut to the chase. Why should I spend money on public relations?*

**PR Plan Developer:** *Public relations gives you the ability to influence human behavior.*

**Potential Client:** *What does that mean?*

**PR Plan Developer:** *It means that public relations can help you motivate people to support, to vote, to consider, to champion, to follow, to read, to buy, to trust, to invest, to listen, to join, to leave alone, to contribute, to believe, to work, to authorize, to accept, to welcome, to compromise, to accommodate, to cooperate, to wait, to decide, and I can go on and on, as you can see.*

**Potential Client:** *How does it do that?*

**PR Plan Developer:** *Public relations influences the behavior of people through persuasion.*

**Potential Client:** *So public relations uses devious means to manipulate people?*

**PR Plan Developer:** *There are two sides to everything people do—good and bad. Public relations influences behavior honestly and ethically through strategic communication.*

**Potential Client:** *How does this work?*

**PR Plan Developer:** *PR plans, one can say, mirror the process of persuasion. Public relations sets objectives to accomplish a goal. It taps into the field of persuasion to design actions to influence an individual, group, or organization toward achieving a goal.*

**Potential Client:** *Be more specific.*

**PR Plan Developer:** *Specifically, here's an example of persuasion. Let's say a person, like a stockbroker, takes an action (recommends a stock selection) to a target (potential investor), designed to cause a particular behavior (recommendation accepted).*

*An objective in a PR plan is similar to the persuasion process just described, in that it has three parts: (1) an action to be taken; (2) a target, or receiver of the action; and (3) a behavior desired of the target as a result of the action taken.*

**Potential Client:** *Give me an example.*

**PR Plan Developer:** *Here's an example of a PR objective:*

Action	Inform about skyrocketing cost of medical insurance
Target	Employees
Desired behavior	Willingness of employees to accept an increased share of the cost
Objective	To inform employees of the company's skyrocketing cost of medical insurance so they are willing to share part of the employer's increased cost.

**Potential Client:** *How do you assess results?*

**PR Plan Developer:** *Results can be assessed on the basis of performance and effectiveness. Was the PR plan carried out completely, accurately, on schedule, and on budget? What was the outcome of the PR plan: (1) attempts to influence failed; (2) influence attempts got attention; (3) influence attempts got the behavior desired.*

**Potential Client:** *Are all PR people trained in persuasion?*

**PR Plan Developer:** *That's a good question to ask when you interview job candidates and PR firms. Many PR people have a good background in persuasion derived from a broad liberal arts foundation in history, psychology, sociology, geography, language, ethics, and philosophy, as well as many of the sciences. In acquiring this valuable knowledge, they have learned to think and read critically, collect and organize facts, and analyze them and form ideas. They have the ability to analyze a situation, the cultures involved, the mindsets of opposing factions, and similar past lessons learned. They also draw upon the profession's body of knowledge of actual experiences. Public relations is the practice of influencing behavior through strategic communication and is a profession that holds itself accountable for cost, completeness, effectiveness, and measurability.*

## *Put Yourself in the Place of a Plan Reviewer*

Plan developers must be aware of the many considerations plan reviewers must take into account when considering plans, for example, “How do I justify this plan in terms of cost, benefits, and need?” In other words, “Will the benefits I expect to derive from the plan be worth the time, money, and energy that has to be put into the plan to accomplish its goal?”

A question of equal importance: “How does the need for this plan rank among all of the other pressing needs of the organization?” A PR plan could require \$5,000 to well over \$500,000 to develop and implement. A request for such an expenditure, assuming that it is an expense over a current budget, must compete on its merits with all other special requests for authorizations for funds within an organization. That’s why a plan’s cost and benefits must be made absolutely clear to a reviewer.

With regard to cost, a plan also must be affordable to the organization receiving the proposal. That’s not to suggest cutting corners or lowering standards to suit an organization. If a PR action can’t be done right it shouldn’t be attempted. Fortunately, in public relations, there are many different ways to accomplish communication objectives cost effectively. So a plan must establish a clear need for PR action and must propose a cost-effective orchestration of communication activities that is within the sponsoring organization’s budget.

A plan reviewer also could be expected to ask, “What’s the basis for your justification of this plan?” With this question, the reviewer is holding the plan developer accountable for completeness. The reviewer wants to see that the plan developer has all of the information necessary for the reviewer to make a thorough assessment of the plan in order to decide whether or not to approve it. That means the plan developer must be diligent in writing each component of the PR plan: (1) problem challenge or opportunity statement, (2) situation analysis, (3) target audiences, (4) goal, (5) objectives, (6) strategies, (7) activities, (8) time line, (9) evaluation, and (10) budget. As you develop a plan, ask yourself if you are presenting all the information a reviewer would require in each area of the plan to enable the reviewer to make an assessment and reach for a pen to approve your plan.

A reviewer also could be expected to ask, “How do you know this plan will be effective?” Most plan reviewers have no formal education in public relations and will be looking for assurances that what is proposed in the plan is what will be necessary to obtain some reasonable measure of success in achieving the plan’s goal. It is incumbent on the plan developer to educate the reviewer in knowing that PR plans are based on proven principles of communication and persuasion and on the body of knowledge in the social sciences that has been acquired by the profession over several decades.

Another important way to assure effectiveness is with research. The use of research, despite its immense value, has yet to become fully utilized in the profession. The term *research*, by its own definition—connoting formal, costly, time-consuming study, documented investigation, and examination of a condition existing in one past moment or period of time—retards its use. Heads of organizations who have ultimate control of PR spending have historically resisted spending money on research. With new technologies, however, research is becoming much more affordable and timely.

Measuring effectiveness doesn’t always require formal research. The fact is, there are many forms of research that are not costly or time consuming. In the broadest terms, everyone conducts research. We all gather information to find solutions to problems. It is an important function in our daily lives and not as a formal process. Research is vitally important in the development of plans and should not be summarily dismissed.

A plan reviewer could be expected to ask, “What indications will you have to show that your PR plan is, in fact, proceeding effectively toward accomplishing its goal?” With this question, the reviewer is holding the plan developer accountable for measurement. Assuming the plan is being implemented, how can its effectiveness be measured? The answer should be that the plan’s objectives—all

of them—are measurable. Every one of a plan’s objectives should be written to include a desired behavioral outcome that can be measured in qualitative or quantitative terms.

## 6. Writing with Clarity

As a PR plan developer, you are at the center of action. Developing a plan requires you to communicate clearly and concisely in many forms with a full range of people of varying backgrounds at different levels of expertise. You cannot develop an effective plan off the top of your head sitting in a coffee shop. You must seek out information sources and have the gumption of a researcher, and you must be a good writer.

There’s no need to get tense about this. You have more control over your writing than you might imagine. Let’s take a practical approach to these requirements. For example, how often have you said to yourself, “This time, what I write is going to be really good!” How often have you been disappointed that nothing much changed, no matter how hard you tried? That’s not a reflection of your ability. The old axiom that practice makes perfect is misleading. No matter how hard you try, practice alone can simply reinforce old habits that keep your writing from improving. So let’s look at specific tactics under your control that can make your writing more effective.

There are four elements you can control in preparing a message. Be clear—write in plain talk and use details people can visualize. Be brief—write in simple, declarative statements. Be direct—use active verbs and comfortable words. And yes, by all means be human—write the way people converse. If any of these elements seem contrary to the way people in your organization write, be courageous. Set the standard. That’s what an organization expects of PR professionals.

There are four more elements you can control. They will enable your writing to connect with people whether you are writing a situation analysis or requesting data. The beginning of every communication should get directly to what your readers want to know. “What’s this about?” Provide the big picture, the broad context for your communication. “Why are you telling me?” Give the purpose of your communication—to inform, alert, announce, and the like. “Why should I care?” Pique their interest; tell what’s in it for them. “What’s your point?” Explain the thesis—the point—of your communication. Try to answer these questions in the opening of your communication.

There is more in your control to improve your writing. So far, we covered preparing the message and connecting with people. Next we’ll look at what you must do to maintain the connection with receivers of your message, as well as reviewers of your plan. First is persona—the level of expertise you bring to the subject. Second is tone—the attitude you convey toward the subject. Third is voice—the personality you project. Fourth is style—the distinct or characteristic way you deliver the message (i.e., length of sentences, use of phrases, etc.).

Once you connect with your readers, you must cause them to think about your communication long enough to influence their behavior, to win acceptance of your plan. Make your plan come alive by conveying the elements of the plan through a story—something motivating, inspirational, a situation that makes them wonder what they would do. Issue a call to action. Make an emotional plea—tug at what they care about. Surprise them—seek action through something people haven’t thought about. Fill your plan with valid substance—lots of details, convincing research data.

Tactically speaking, you have just discovered 16 ways under your control to improve your writing. Practice can make perfect, now that you know what to practice.

*Table 2. Sixteen Controllable Ways to Improve Your Writing*

**Preparing Messages**

CLEAR—plain talk, using details receivers can visualize

BRIEF—simple, declarative statements

DIRECT—active verbs and comfortable words

HUMAN—like a personal conversation

**Connecting with Receivers**

PICTURE—the broad context of your communication

PURPOSE—why you are communicating; to inform, alert, announce, etc.

PIQUE—what’s in it for the receivers; pique interest

POINT—your main point; the thesis

**Maintaining the Connection with Receivers**

PERSONA—level of expertise you must bring to the message

TONE—attitude you convey toward the message

VOICE—personality you project

STYLE—distinct or characteristic way the message is delivered

**Making Messages Stay Long Enough to Influence Behavior**

STORY—motivating, inspirational, what receivers would do, call to action

EMOTIONAL—tug at what receivers care about

SURPRISE—seek action, something people haven’t thought about

VALIDITY—details, convincing data, third-party endorsements

**Image Credits**

Fig. 1a: Copyright © 2013 iStockphoto LP/A-Digit.

Fig. 1b: Copyright © Shutterstock Images LLC/Pavel L Photo and Video.

Fig. 1c: Copyright © Depositphotos/yupiramos.