



PRIMER: Introduction to PR planning

Guide written by

Gemma Moroney - Head of Insight & Strategy,
ENGINE Mischief and Partner **ENGINE**
on behalf of **AMEC**, November 2019

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Opening note



**Richard Bagnall, Chairman, AMEC
Co-managing Partner, CARMA International**

Measurement and evaluation are largely meaningless in the absence of a plan. Planning is an integral part of the process. A plan will set out clear objectives, identify desired outcomes, define success and set appropriate targets. If the industry has a problem with planning, this, by definition, will hold back the ability to drive relevant and meaningful measurement, evaluation and insights.

The importance of planning is something the industry recognises, with over two-thirds of respondents to our Maturity Mapper saying they value it. Yet the uncomfortable truth is that it's often something time-poor, resource-constrained and under-pressure professionals forego. In an increasingly fast-paced, pressurised industry even the best intentions can quickly go out of the window.

The increased effectiveness delivered when you stop merely "sending out stuff" (to quote the UK Government Communication Service's Alex Aiken) and start investing time and resource in planning to is plain to see. We have long wanted to provide a resource that sets out the point, benefits and best practice for account planning and we are delighted to unveil this primer guide.



Johna Burke, Global MD, AMEC

This free primer guide provides an introduction to 'account planning' and how it can be specifically applied for PR and communications. It also offers guidance on how to use our freely available AMEC Integrated Framework as a planning model. Together, they form the start of a resource from which the whole industry should be able to benefit.

Over the next six months, our aim is to invite peer review of this primer from AMEC's global chapters, building it out further into a truly global resource that can be unveiled at our next summit, in Vienna. It marks the start of a new set of resources for AMEC, which will also include a strategic planning guide, developed with our education partners.

We very much look forward to collaborating with the industry on this and providing more of the best practice AMEC is famed for.

A note from the guide author



**Gemma Moroney - Head of Insight & Strategy,
ENGINE Mischief and Partner, ENGINE**

2018 marked 50 years since Stanley Pollitt (my hero) and Stephen King (not that one) simultaneously introduced the confusingly named 'account planning' into advertising. Without a doubt, account planning has improved advertising, giving stellar moments to equal those of advertising's usual rockstars: the creatives.

I understand PR eventually followed advertising's lead, beginning to formalise a planning function around the 1990s. An early appointment was of Andrew Jones, formally of BMP (the P stands for Pollitt), to Countrywide Communications, London, by the formidable and forward-thinking Barry Leggetter. Barry is of course AMEC's former CEO.

However, looking back to a 1999 Campaign article, we don't seem to have made the great strides our advertising cousins have since. Many of the discussions and topics raised twenty years ago are still being raised today. It is time to move this on. This is why I was delighted to be invited by AMEC to lead this initiative.

A lot of UK industry talk lately has been about the rise of the Creative Director in PR. Everyone loves the thought of ideas on speed dial but we need to be having this conversation about planning too. For me, there is no effectiveness without creativity but there's also no creativity without effectiveness. Ideas or tactics, however well-executed, are not enough. They need to be grounded in business objectives and long-term ambition.

In the coming years, the industry is going to have to connect with people who will be harder than ever to find; continue to prove PR is not only media relations, as 'media' shapeshifts beyond recognition; create complex sentiment, behaviour or policy change in a landscape that seems to accept less and less nuance by the day. It means we need to make progress in proving our strategic rigour and worth, faster than we've ever made it before.

This guide is designed as a starting point to basic campaign / 'account' planning, so I can't promise it will cover everything or be without debate but I do hope it will be useful.

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CHAPTER ONE: What is planning, why does it matter and what does it cover in PR?

Account planning: a potted history

"The voice of the consumer"

The discipline of planning was conceived at pretty much the same time by two advertising men working in different agencies – Stanley Pollitt at BMP and Stephen King at JWT. The term 'account planning' was conceived by Tony Stead at a JWT away day in 1968. It's a name that seems to have confused people ever since. But confusing name or not, one thing was clear. Pollitt's vision was that the planner represented "the voice of the consumer within the agency".

He was also adamant that the effectiveness of the work was paramount, being a champion of "getting the [advertising] content right at all costs". He felt this more important than "maximising agency profits, more important than keeping the clients happy or building an agency shop window of distinctive work".

Since then, planning has of course evolved and there are now a wide variety of different planner roles across advertising, media, social, PR and other agencies (you can find out more about these in this guide's appendix).

The APG – the voice of 'account planning' in the UK – has continued to update the definition. Whilst once the role was of a 'glorified market researcher', they now explain the role of a planner as including:

1. Deciding on the aims of the campaign based on what the client's business needs to achieve – in terms of sales or consumer behaviour
2. Creating a strategy designed to meet the client's business objectives. This often involves an overarching idea for the campaign
3. Producing a brief for the creative teams designed to inspire original work that meets the strategy. Plus, working with the Creative team to help evolve their ideas and with the account teams to prepare the work for selling to the client.
4. Monitoring how effectively the campaign meets business objectives and to help change and amend the work over time to keep it fresh and makes sure it's relevant to the target audience³

In contrast, PR planning has perhaps often been equated with just 'writing a plan', or worse, a timeline of tactics. Planning is also often conflated with 'getting ready for agreed activity to go live'. If this happens, the potential for effectiveness can be lost – or at the very least success ends up being down to luck not judgement.

REMEMBER

Planning is not (just) writing an executional plan or writing a timeline. Planning is the discipline that represents the voice of the consumer. NB: for PR, it's probably more helpful to say the voice of the audiences – to include a number of 'publics' and their influences, as for example PR/ public affairs may have an 'end' audience but also several audiences they need to communicate with in order to influence that end audience. Planning is also responsible for defining the problem, setting a strategy, evaluating creative work and guarding effectiveness continuously.



Why does planning matter and why does NOT planning limit potential effectiveness?

“Otherwise, you’re just sending out stuff”

Our teachers were right: if you fail to plan, you plan to fail. Planning is about finding the right way to connect with people to create communications that solve a business or organisational problem. Without a clear understanding of who you’re trying to reach, why, and what you want them to do, how can you know what you should be saying, where and when? And without an understanding of your current situation and your ambition of where you need to get to and how you’d know you’d achieved it, how can you measure and evaluate whether it’s been effective?

Alex Aiken, head of the Government Communication Service, quite rightly tells communicators if they don’t effectively plan and the measure and evaluate, they’re just “sending out stuff”. A recent Twitter thread following the announcement of this guide saw Damien Currie of GCS noting: “This approach is hard-wired into every single piece of work...My first question to non comms colleagues wanting our help is always what do they want their audience to do”.

It’s clear the importance put on effective planning is a critical part of GCS’ success – a number of their impressive campaigns can be found in the AMEC case study bank. Delivering against a call to action is often an important KPI for effective PR campaigns, particularly amongst organisations seeking positive behaviour change.

CASE STUDY: Why understanding the target audience and its influences matters

Here is a Mischief example using a brief aiming to test whether targeted, hyperlocal communications could help dissuade young boys from getting involved in violent crime. On receiving the brief, there was an initial ‘gut feel’ idea:

When you’re arrested, we all know you get ‘one phone call’. Imagine having to call your family or friend to tell them what you’ve done. What if with permission, we could record these ‘one calls’ and use them as the hook for a media relations and content campaigns and provide a deterrent for young boys?

This seemed an emotive and newsworthy campaign idea. However, the process was still at the research stage. Part of the research plan was to interview a forensic psychiatrist who worked in prisons (under NDA). She helped show the problem in a new light: the conventions of communicating with young men and boys about violent crime always focus on the same subjects and types of people – footballers, music stars, using reformed gang members as role models. This assumes an ‘inevitability’ that certain young boys will all fall into violent crime and assumes all young boys have the same role models. This helped shape the further quantitative and qualitative research then done with young boys.

The eventual campaign flipped this conventional negative script and focused on positives: helping the target audience build resilience and see their potential for future success. It had some promising outcomes.

This approach would not have been landed on without a mixture of extensive research. The initial idea might have commanded column inches, created conversations and gained creative plaudits. But because it didn’t understand the audience, it probably wouldn’t have actually been effective.





How does PR planning differ to advertising planning or paid media planning?

Gut feel about what makes news and what makes people act is a powerful thing but, what may seem like a good approach or activation isn't necessarily going to solve a problem effectively.

PR planning has yet to be truly formalised – or revered – within the industry in the way it has in advertising or media. In fact, AMEC Chairman Richard Bagnall recently asked delegates at the PRSA International Conference, “Who here has a strategic comms plan for their campaign?”. Three people in a room of 120 raised their hand.

Effective PR Planners (PRPs) need a broader remit than their advertising or media agency counterparts. PRPs must be able to consider the problem, the audience/s, the influencers of those audiences, the balance of media channels or channels of influence, the brand and the wider world. And on top of that, PRPs usually need to earn the audience's attention, support of Key Opinion Leaders (KOLs) or intermediaries, analysts or support of politicians and policymakers

Proposed definition of PR planning:

“The discipline of understanding an organisation, the world in which it operates, its target audiences and their influences, in order to 1. inspire and evaluate strategies and communications using third parties to promote or protect a brand or business' reputation, 2. guide creative and effective implementation and 3. deliver measurable organisational impact and improvement.”

This includes, but is not limited to:

1. The skill of identifying the problem communications is going to solve – too often, PR is tasked with the wrong role or is set far too many objectives which lack measurable focus. What's crucial is turning an organisational objective into something communications can solve.
2. The importance of being the voice of the audience in order to help find the best way to solve the problem – creating a strategic comms plan guided by insight(s) and research.
3. The role of turning objectives and audience insight into the best strategy (which can be defined as finding the right answer, to the right problem or as finding the shortest route to your goal) – so that you are clear what you're setting out to achieve, and have this to keep referring back to when assessing tactics.
4. The need to consider the best channels to target the audience and/or its influencers – knowing how to best communicate with your audience.
5. The role as a guardian of creative effectiveness – inspiring and collaborating with creative and teams, as well as being responsible for guiding measurement and evaluation before, during and after activity.

TOP TIPS:

To re-cap some of these terms:

Goal – where you want to get to, broader than an objective (eg: “Be the best-loved brand in the category”).

Objective – a statement of intent that is SMART – Specific, Measurable, Achievable, Realistic, Time-bound (e.g.: “To increase brand love on our tracker by 5% during 2020”).

Insight – excellent definition from Mark Pollard: “an unspoken truth that shines a new light on the problem”.

As an example of an excellent true insight: Sport England's This Girl Can team have spoken regularly about how they identified the insight that it was an emotional barrier – the fear of judgement over appearance, abilities and priorities – rather than a practical one that was holding women back from being as active as they wanted to be. This changed how the problem (tackling the gender gap in exercise) was approached and dictated the campaign strategy (liberating women from the judgement that holds them back).

Strategy – often defined as “the fastest route to your goal”. This is a good point to flag that often you could adopt a variety of potential strategies – part of planning is to work out what the best one is.

Measurement – scoring how your activity has performed in changing the metrics set out in your SMART objectives.

Evaluation – this is about improving, not just scoring. Understanding what worked well and why, what didn't work so well and why, how you can improve and how your objectives and strategy might now shift for the future.

CASE STUDY: How one agency thinks about this

ENGINE | Mischief's planning team sees its responsibility as advising the agency on:

Consumer Behaviour & Insight	What do we know about key audiences and cohorts? Why do people behave the way they do?
Channel	Which channels are most important for influencing which audiences? What type of content works best for which channels?
Context	What's happening in the wider world (news, trends etc) that can inspire, impact and improve our work?
Creative Effectiveness	How do we best measure and evaluate success of our work?
And working with the creatives and client teams on Creative Strategy	What's the insight-led organising idea that drives our strategic comms plan?

CHAPTER TWO: Planning principles and some popular models

There are [probably] a million models to help planners organise their thinking. From the psychological to the behavioural, brand archetypes to market mapping. As this guide is designed as a simple introduction to planning in PR it will not be exhaustive. However, there is some suggested reading in the appendix.

To provide a useful first step, we have summarised some examples of best practice planning models in this chapter, to provide an overview of successful approaches. Chapter 3 then provides a free template based on AMEC's Integrated Evaluation Framework, which we hope will provide an excellent addition to this freely available model of best practice, helping you to create even more effective work.

TOP TIPS:

Defining the problem is one of the most crucial parts of planning. Apparently, Einstein said "If I had an hour to solve a problem, I'd spent 55 minutes thinking about the problem and 5 minutes thinking about the solution."

Another fantastic maxim is "the solution is in the problem" – if you can really get to the bottom of the problem, it becomes much easier to work out an effective strategy – see the example of this below.

Defining the problem and knowing what success looks like also go hand in hand – measurement and evaluation should start at the planning stage (for more information on measurement and evaluation – read the guide that AMEC worked with ENGINE, ISBA, the PRCA and PRWeek to produce).

Case study 1: Planning approach at ENGINE | Mischief

The traditional approach to advertising 'account planning' is that the planner writes a creative brief, which is then briefed to creative teams and reviewed by the Creative Director and the Planning/Strategy Director. At ENGINE | Mischief, the planning approach brings planner and creative together, rather than working in a more siloed process. This is seen as crucial for the agility of PR (working at the speed of life as we call it) and to reduce any disconnect between the strategy and the work.

The aim is to use the four prompts outlined on their 'P.L.A.Y.sheet' to coach the wider teams, focus thinking and research and reach a creative strategy. The P.L.A.Y.sheet planning model is based on an acronym:

P – problem (what are the commercial and communications objectives? What's the current situation and why? what needs to change?)

L – look at audience (who are they, how do they behave now? why?)

A – ask how you'll earn attention (what influences our audience? what is the convention in the category? what content will best influence the influencers?)

Y – you'll know you've done it when (what does success look like)

Here is a summary of the P.L.A.Y. sheet for a multi AMEC award winning campaign – The Nation's Ode to the Coast for the National Trust:

P	The National Trust's coastal conservation fund was approaching its 50th anniversary and a big fundraising appeal was planned. A campaign was needed to prime the nation for the appeal. However, awareness of the Trust as a coastal conservation charity was less half than that of its built heritage work AND the nation's connection with the coast was at an all-time low. So this wasn't just about talking about a fundraising campaign, it was about preparing the audience for it. We needed to raise awareness of the Trust's work, affinity and advocacy for it, plus prime people for action (responding to the fundraising appeal)
L	Our audience was explorer families – city-based, with kids aged 5-15. Behavioural science suggest jeopardy messages wash over heads – so raising awareness of the coast being in danger might raise awareness but might not change affinity or action. We needed to take a more positive approach.
A	We found that the audience all shares similar memories of days at the coast as a child. The thought of not being able to share that with their kids or grandkids hit a nerve. We should play on their love of the coast and what it means to the nation.
Y	If we help prime the nation for a successful fundraising campaign, by first increasing their awareness of the Trust caring for coastline, their affinity with this work, their advocacy for the cause and encouraged them to commit to a small action.
Our creative strategy	Reframe the 775 miles of coastline the National Trust cares for as 775 miles of memories

You can read about the work in more detail in the AMEC case study bank. amecorg.com/case-studies/

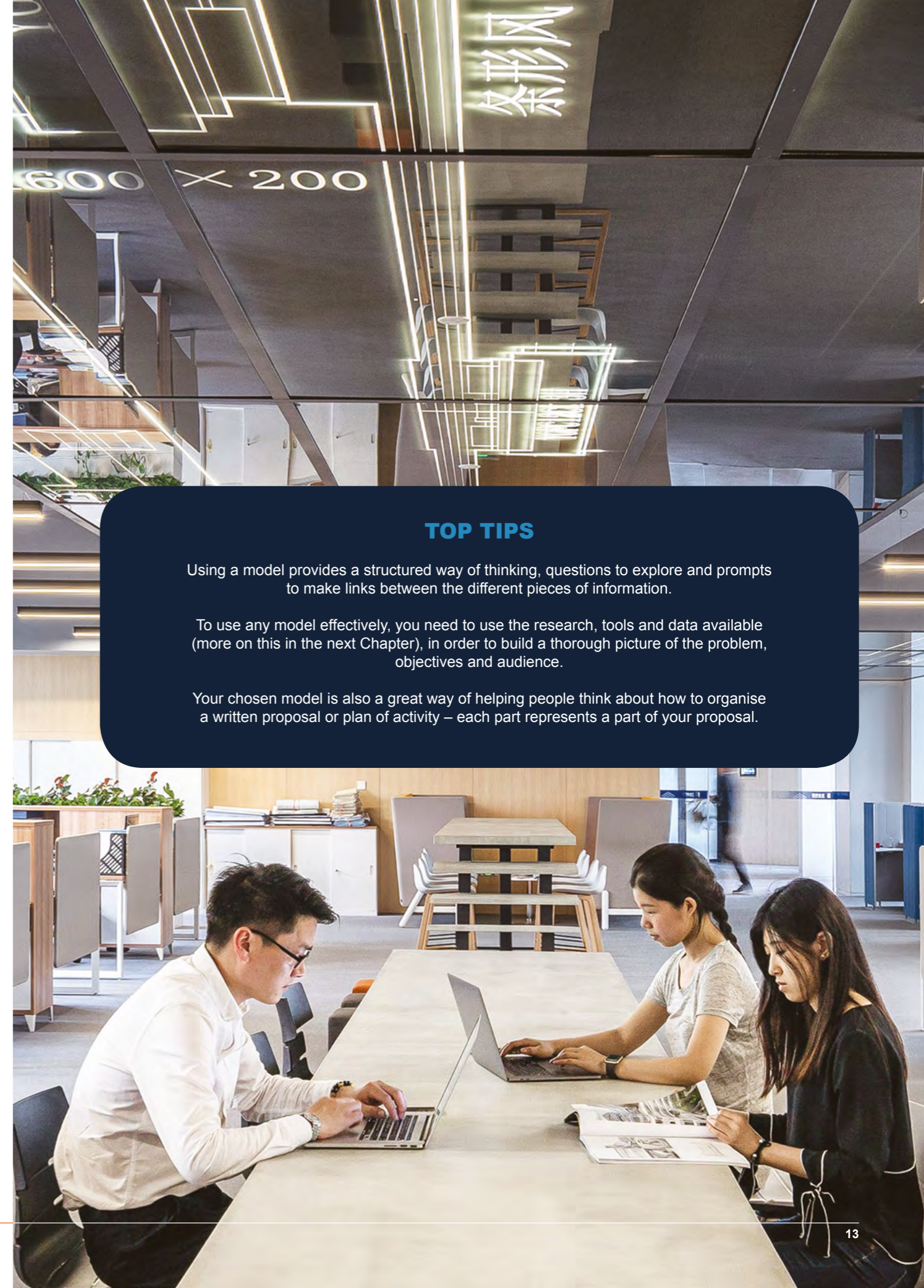
Case study 2: OASIS – an approach used by the UK Government Communication Service (GCS) et al

OASIS stands for Objective, Audience, Strategy, Implementation and Scoring. The OAS being the initial planning elements, the I being the execution and the final S covering measurement and evaluation.

GCS encourages communications colleagues of all disciplines, departments and grades to use this model and makes information freely available online.

An award-winning example of their work using this model is the prison officer recruitment campaign for the MoJ. The following gives a summary of that work (NB – the activity deployed a far more complex and in-depth approach than can be fully covered here, including seven key strategies. A full case study of the project can be read on the AMEC website).

Objective	Organisational objective: Prison safety and reform, including recruiting 2,500 additional prison officers, to make prisons safer and reduce re-offending rates. Communications objective: To attract quality candidates to a role that is perceived by the public as dangerous and unrewarding, in a way that represented value for money, by demystifying the role of the prison officer as a 'turn key'.
Audience	People who are looking to switch jobs, and who are within approximately a one-hour commute of the priority prisons. They must be over 18 and at non-managerial level.
Strategy	Celebrate the hidden service - focus on showcasing the benefits of the role, something of which people were less aware, rather than the daunting elements, relentlessly covered by the press. A wide variety of sub-strategies were also deployed, including a new focus on using data to align the campaign to live demand for applicants and measure applications response, leveraging the influence of friends and families and working with stakeholders.
Implementation	The implementation included press coverage in consumer and local media, geographic weighting according to need/demand, native content, website, relationship marketing, SEO, job boards, radio, events and local partners such as with universities, local recruitment agencies and community groups.
Scoring	The campaign was on track to deliver net 2,500 prison officers at a reduced cost. The measurement and metrics put in place meant the team was able to track the diversity of the applications secured and the most successful channels for attracting diverse applicants. They were also able to demonstrate an improved conversion rate. The innovative approach was rolled out to other recruitment campaigns in the department and learnings made led to regular adjustments in ongoing campaigns.



TOP TIPS

Using a model provides a structured way of thinking, questions to explore and prompts to make links between the different pieces of information.

To use any model effectively, you need to use the research, tools and data available (more on this in the next Chapter), in order to build a thorough picture of the problem, objectives and audience.

Your chosen model is also a great way of helping people think about how to organise a written proposal or plan of activity – each part represents a part of your proposal.

CHAPTER THREE: How to use AMEC's IEF as a planning tool

The AMEC Integrated Evaluation Framework was written as a framework for measurement and evaluation, putting the emphasis on out-takes, outcomes and impact, not just outputs. However, it is also a very useful planning tool because it forces you to consider the problem communications is tackling and the impact desired.

One of the main aims of this guide was to provide a more formal approach to use the AMEC IEF as a planning tool. The interactive framework already provides a wide variety of the prompts required for better planning, with a wide selection of tools and prompts. Therefore, the following is offered as additional guidance.

AMEC IEF Guidelines	Planning considerations	Helpful tools
<p>Box 1: Objectives</p> <p>Like all good measurement, it should start with clear organisational objectives. These can come in many different forms, whether they be awareness, advocacy, adoption or demand related. Following on from organisational objectives, is communication objectives. These should reflect and mirror the organisational objectives. Remember, the difference between an objective and a goal is that an objective has a measure of impact (e.g. 20% increase in brand awareness), compared to a goal that is an aspiration (e.g. increase brand awareness).</p>	<p>What are the organisation's objectives? What are the communications objectives? How do they link to the organisation's objectives? Is it feasible for communications to tackle these? Are all your objectives SMART? Is the problem identified the right one? Is there another way to look at it? Which organisations have been in a similar position before? What did they do?</p>	<p>Example tools to use here: Overall business strategy (eg as presented in a plc's annual reports) AMEC case study bank, desk research, APG and WARC Godrej example of linking communications goals to organisational goals (see Chapter 5 for this)</p>
<p>Box 2: Inputs</p> <p>This section covers two important areas. Firstly, to define the target audiences of the campaign. Second, is the strategic plan and other inputs such as describing some of the situation analysis, resources required and budgets.</p>	<p>Who are your target audiences? What do we know about them? What do we need to find out? Where can we find this? What do you want them to do? Why are they not doing it now? Which channels and people (media, KOLs, online influencers, partners, experts etc) are most influential on your audiences? Does this differ across PESO? Why are they not currently influencing your audiences in the desired way? What means the organisation is not currently in a position to achieve its objectives? What means competitors are at an advantage on this matter vs your organisation? What is the wider-world context? Are there any other, eg wider world, impacts or influences to bear in mind? What budget and other resources are available to you? In what timeframe? Any other considerations or mandates?</p>	<p>Example tools to use here: TGI, GWI, Mintel, Factiva, YouGov, Kantar, desk research, quantitative research, qualitative research, AMEC case study bank</p>
<p>Box 3: Activities</p> <p>This section is outlining what activities were carried out, any testing or research, content production etc – including across PESO</p>	<p>How are you benchmarking the current situation? How will you use this data, research, analysis and insight to change things?</p>	<p>Example tools to use here: Factiva, YouGov, Kantar, Cision, Brandwatch, Meltwater, Talkwalker, Hypr, Traackr, Lexis Nexis, quantitative research, qualitative research, Google tools</p>

From these boxes, you should be able to arrive at an overall strategy, which you should be able to write as: **Action + Audience <from/by/to> problem**

- Eg:
- Liberate women from the judgement that holds them back (Sport England's This Girl Can strategy)
 - Reframe 775 miles of coastline to 775 miles of memories (National Trust Coast strategy)

At this point, consider whether this strategy is sufficient to meet the objectives, over the long-term.

You may wish to have an overall strategy and a number of sub-strategies (as per the GCS Ministry of Justice example in chapter Two)

AMEC IEF Guidelines	Planning considerations	Helpful tools
<p>Box 4: Outputs</p> <p>This covers the core measures across PESO. So for example what was the reach of the paid advertising, how many visitors to the website, how many posts, tweets or retweets, how many people attended the event, and how many potential readers of the media coverage. This is quantitative and qualitative measures of outputs. (In short, what 'stuff' did you do!)</p>	<p>What are the right activities to bring your strategy to life, based on your research, insight and audience? How do the key influences we identified on the audience affect our chosen outputs? In what order and across what timeframe?</p>	<p>Example tools to use here: Factiva, desk research, Newswhip, Hypr, Traackr</p>
<p>Box 5: Out-takes</p> <p>This refers to the response and reactions of your target audiences to the activity. How attentive were they to the content, what was their recall, how well understood is the topic, did the audience engage with the content or did the audience subscribe to more information.</p>	<p>What do you want people to think differently as a result of what you are going to do? How will you set out to measure this, before, during and after?</p>	<p>Example tools to use here: Cision, Lexis Nexis, Hypr, TRaackr, Talkwalker, Brandwatch, Meltwater, YouGov, quant and qual research, organisation's own data</p>
<p>Box 6: Outcomes</p> <p>This measures the effect of the communications on the target audience. Have the target audience increased understanding, has it changed their attitude to the topic, has it increased trust and/or preference, has it had an impact on the intention to do something (e.g. trial, subscribe, register) or increased online advocacy.</p>	<p>What do you want people to feel differently as a result of what you are going to do? How will you set out to measure this, before, during and after?</p>	<p>Example tools to use here: Cision, Lexis Nexis, Hypr, Traackr, Talkwalker, Brandwatch, Meltwater, YouGov, quant and qual research, organisation's own data</p>

You should see the above as a chain that together leads to meeting your desired impact. Your desired impact is delivery against your communications – and ideally commercial (/organisational) – objective.

<p>Box 7: Impact</p> <p>This is where impact on the organisational objectives is evaluated. So here the tool is looking to cover reputation improvement, relationships improved or established, increase in sales or donations, change in policy, or improved social change. This is a clear demonstration of business outcome and link to organisational objectives.</p>	<p>What do you want people to do differently as a result of what you are going to do? How will you show your strategic communications plan contributed to meeting the communications and organisational objectives?</p>	<p>Example tools to use here: Cision, Lexis Nexis, Talkwalker, Brandwatch, Meltwater, YouGov, quant and qual research, organisation's own data</p>
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Reported impact should reflect your previously stated SMART objectives – definitely showing progress vs your communications objective/s and ideally vs your commercial/organisational objective/s. The impact delivered should be evaluated honestly so that the strategic communications plan can be improved upon and optimised for the future.

And when you come to measure & evaluate, think...

- What has worked well against our communications objectives?
- Which outputs have driven the best metrics?
- What does 'good' look like for this organisation? How do we build on this?
- What has shifted as a result of the activity/outputs/out-takes/outcomes?
- What did not change in the way we had expected? Why?
- How should we update our goals/activity/measurement & evaluation accordingly?

TOP TIPS

Use the AMEC IEF as a planning tool – it provides helpful prompts for each element of a planning process, when used alongside the guidance above.

It's a very useful 'stress test' – your one pager (as per the dummy examples above) can be used to help highlight whether you have SMART objectives and an insight / whether your outputs are going to create a chain of effectiveness leading to an impact.

Here are two hypothetical examples of what a one-page communications plan might look like based on using the AMEC IEF and the principles, guidance and tools above to plan:

Fictional example one: “TrackRail plc recruitment drive”

Problem	Objectives	Audience	Strategy
Our train company TrackRail Plc wants to increase its recruitment of female drivers, to have a more representative ratio	<p>Commercial Increase % of female drivers from 15% to 30% over the next five years, in line with our shareholder promise to become a more representative employer (source: internal analytics and data)</p> <p>Communications Raise awareness of positive job opportunities for females from 20% awareness over the next five years (source: external measurement partner, brand tracking)</p> <p>Increase applications by females from females to 10,000 per annum (source: internal data)</p>	<p>Audience: Women currently working in a service role Who live up to 1 hour from a mainline station and can drive a car (source: internal analytics and data)</p> <p>Barriers: Fear of unsociable hours, being in the minority, being discriminated against, being lonely at work, unsure as to their suitability (source: focus groups, omnibus survey)</p> <p>Drivers: Pay and promotion prospects Work-life balance Family-friendly policies (source: focus groups, omnibus survey)</p> <p>Key influences: Regional media Female websites and magazines Sunday papers & supplements Influencers, eg Instagrammers Advocacy from friends family and experts (source: TGI)</p>	<p>Use real, local women’s stories to show becoming a train driver can help you get all your ambitions on track</p> <p>Target these to the areas where there is most need and there is a concentration of the target audience</p>
Outputs	Out-takes	Outcomes	Impact
<p>PHASE ONE</p> <ul style="list-style-type: none"> Briefing national and regional media across women’s, features, employment on the drive for more female drivers Case studies of females employed by TrackRail – from drivers to management who started as drivers, to show females who enjoy the job and that there is progression and the job is well-paid – to be placed with key regional media Day in the life content – showing who female drivers achieve work-life balance and what happens on a typical day (including room to show team-work and camaraderie) – to be placed with key regional media <p>PHASE TWO</p> <ul style="list-style-type: none"> Influencer partnerships – pairing Instagrammers with female train drivers to help demonstrate the benefits of the job Entering and promoting wins of employer awards eg Sunday Times Best Place to Work <p>PHASE THREE</p> <ul style="list-style-type: none"> Internal comms to encourage positive advocacy from existing female drivers – to help create advocacy amongst friends & family A fun, interactive test to help women self-select whether they have the right skills to be a train driver – to be placed on women’s and lifestyle sites <p>PHASE FOUR</p> <ul style="list-style-type: none"> Run Women in Rail week, including events at local stations and shopping centres 	<p>Audience reach of women aged 25+ within one hour drive of mainline stations in need – 70%</p> <p>Key message delivery – 70%+</p> <p>TrackRail is a progressive employer There are great opportunities for women train drivers – it’s a well-paid career with opportunity for progression TrackRail is a family-friendly employer Working for TrackRail gives a great work-life balance Working for TrackRail means you’re part of a supportive team There are opportunities near you now – visit www.trackrail.co.uk to find out more</p>	<p>Increased awareness of TrackRail offering positive job opportunities, from 20% to 70%</p> <p>Increased propensity for the target audience to consider a career with TrackRail from 10% to 30%</p> <p>Increased applications from the target audience via the campaign website to 10,000 pa</p>	<p>Increase in female recruitment to 30% of total workforce</p>

Fictional example two: “No rubbish impact!”

Problem	Objectives	Audience	Strategy
Our council, Forchester Borough Council, wants to build a new rubbish dump in one of our towns but there is strong local opposition	<p>Commercial To build a new rubbish facility within the next 3 years, on time and within budget, to continue to provide modern sustainable and value-for-money facilities for the borough</p> <p>Communications To reduce opposition to the planned facility from 70% to 20% over one year</p>	<p>Audience: Everyone who lives and works in the town and wider Borough, with key segments as follows based on barriers & drivers:</p> <p>18-30 year olds concerned about sustainability, likely to shop in pre-loved, vintage or ethical stores in the town</p> <p>60+ year olds concerned about sustainability and already involved with environmental groups</p> <p>30-50 year olds who live in and near the town who are in unstable employment</p> <p>Local business owners, especially those with a sustainability focus</p> <p>Barriers: Concern that the facility will be unsightly, smelly, increase traffic and lower property process (source: omnibus, focus groups, consultation meetings)</p> <p>Drivers: Potential to improve rubbish collection and disposal, to provide jobs and to improve the town’s sustainability (source: omnibus, focus groups, consultation meetings)</p> <p>Key influences: Regional and local media Local groups – eg rotary clubs, business networks, charity groups (source: TGI, desk research, local interviews)</p>	<p>To use local voices to show the new facility would be a boost, not a blight</p>
Outputs	Out-takes	Outcomes	Impact
<p>PHASE ONE</p> <ul style="list-style-type: none"> Video content and infographics about the environmental and Modelling study about increased prosperity and no increase in road traffic Identifying and briefing local voices as advocates <p>PHASE TWO</p> <ul style="list-style-type: none"> Recruitment stories for local and regional media <p>PHASE THREE</p> <ul style="list-style-type: none"> Meet the managers events Ongoing interviews and profiling with management in local and regional media Displays and leaflets in relevant local shops eg pre-loved stores, ethical supermarkets, zero waste stores <p>PHASE FOUR</p> <ul style="list-style-type: none"> Open event with models, graphics, video about new facility Local advertising Stories about local people who are supporters of the scheme Q&A event with management 	<p>Audience reach – 80%</p> <p>Key message delivery – 70%+</p> <p>The new facility will not increase road traffic The new facility will create 1,000 jobs The new facility will help residents and business to recycle and re-use much more easily The new facility will make Forchester one of the leading towns in the UK for responsible recycling The new facility will not reduce property prices, it will bring more prosperity</p>	<p>Increased awareness of the key messages (measured by brand tracking/omnibus), from 20% to 60%</p> <p>Increased neutral and positive sentiment towards the proposal (measured by brand tracking/omnibus) from 70% negative to 70% neutral or positive</p> <p>Over 200 key advocates (from business, charity and residents) within the town who can be used as case studies and to help share their positive opinion</p>	<p>Majority support for the proposal – only 20% opposition</p>

These are obviously designed to show a topline overview.

You may also wish to produce a more detailed version, using this sort of template and introducing a specific timeline:

Activity	Role vs business objectives	Role in comms Strategy/ comms objective	Priority level	Key message 1	Key message 2	Key message 3	Key message 4	J	F	M	A	M	J	J	A	S	O	N	D

CHAPTER FOUR: The role of data & insight in PR planning

Does planning need big data?

Insightful interpretation of data is more valuable now than ever – and more creatively fertile

In much-awarded planner Andy Nairn's *Campaign* manifesto for planning he urged:

“The advent of big data should have ushered in a golden age for planning. But it hasn't, because somewhere along the way, our discipline started seeing numbers as boring obstacles to great work. The opposite is true. Insightful interpretation of data is more valuable now than ever – and more creatively fertile. Planners should be better placed than anyone else to seize this opportunity.”

Here are some examples of different approaches using data and research to plan and deliver effective communications:

Initial desk research, followed-up with ethnographic and quantitative research

Home decoration brand

The brand wanted to increase peoples' motivation to decorate and then share steal within the category. The planning process sought to better understand decorating behaviour and motivation. The hypothesis from desk research was that rather than trying to get 'everyone' to want to decorate, the strategy should 'push on open doors' and focus on lifestages where people are more open to considering decorating and ensure they choose to decorate with the brand. To explore this further, ethnographic research was run with the audiences identified: families of primary age-children, first-time buyers and empty nesters.

The moment kids get to choose their first “big” bedroom was selected as a powerful lifestage to tap in to. Additional quantitative research found only 1 in 5 kids had any say in the way their bedroom is decorated. The creative idea was to encourage parents to let kids have “A room with their view” and implementation included a downloadable workbook, imaginative room sets, an advocacy programme with journalists and parenting bloggers and vloggers, and paid content on digital and social media following a little girl's bedroom makeover. The campaign delivered over 6,000 downloads and was shown to increase sales by double digits.

Example sources used: [Communispace](#), [Flamingo](#), [YouGov](#), [Kantar](#), [internal data](#)

In-depth consumer segmentation, sales data and focus groups

First Choice: Creating a point of difference - Braggage

To sustain momentum following a new advertising campaign (strapline: Go Mahoosive with All Inclusive), a strategic communications plan was developed with the aim of helping improve brand consideration. It saw First Choice positioned as the all-inclusive holiday that gives you free 'braggage allowance' thanks to its fantastic hotels, facilities and food and beverage offer. To come up with this approach, we used First Choice's customer segmentation to better understand their target audiences and find common ground between them, as well as to establish the channels and influences that most affect them. We then used qualitative research (interviews) to understand the appeal of an all-inclusive holiday. In short, it was the way they make you feel like you've won the lottery – the ten or so days a year you don't have to say no and are guaranteed something to write home about (Braggage!).

Celebrity duo Chris and Kem helped bring the idea to life by teaching the nation how to get 'Braggage Rights'. Editorial coverage followed across 69 titles, with 64% linking to the First Choice website. Brand consideration rose 82% (source YouGov) and 48% of the target audience said they were likely to book their next all-inclusive holiday with First Choice. This campaign was also translated for internal audiences, with a special guest appearance by Chris and Kem at a company 'town hall' introducing the concept of 'Braggage Rights' followed by a meet and greet with hundreds of staff resulting in mass social media knock on.

In addition, high performing internal comms kept employees engaged with the campaign as it evolved. This increased team pride at working for First Choice, with 82% of staff saying the takeover made them feel a sense of pride to work for TUI / First Choice. 74% said they then talked about First Choice with people outside of work and on social media.

Example sources used: [YouGov](#), [Fly omnibus research](#), [internal data](#) and [customer segmentation](#)

Desk research, social media data and competitor analysis

Huawei's new P30 made waves in the tech world for its 40MP Leica Quad camera system and unique AI functionality, with the ability to recognise everything from sunsets to cats and dogs. Geeks got it. We needed to take that message wider – to consumer audiences. But competitor desk research showed the convention in the category was to run an Instagrammer competition and no-one wants yet more pictures of avocado on toast, surely?!

We found more than 3.8million photos and clips of cats are shared each day (3), 49% of people in the UK have a pet (PDSA/YouGov). Social media listening showed us that people who owned or had used Huawei devices with pets had remarked on the superior quality of images taken in 'cat' or 'dog' mode. Meanwhile, data from social AI tool NewsWhip had revealed brands saw up to 295% more comments on content including pets and an average 19% increase in likes (all interesting outcomes!).

Our strategy was based on the thought: What if instead of focusing on humans, we focused on animals? What if we proved the true power of a good quality photo? Around 250,000 animals enter animal shelters in the UK each year. As a brand Huawei is focused on using tech to unlock potential – so why not apply that to animals too?

After speaking informally to a number of animal charities, we learned many animals are left unadopted due to perceived defects: photos just weren't doing their personalities justice! We decided to create a short documentary-style film, fronted by an animal loving ambassador, to create stars of 'unadoptable' pets residing in shelters across the UK – a twist on the TV show 'The Undateables' - and provided Huawei P30 handsets to the shelter so they could use the phone to take better pictures of their animals awaiting adoption. In line with the brand's Make it Possible values, multiple handsets were also donated across the charity's network of shelters to help as many pets as possible find new homes.

The heart-warming content supported the brand's short and long term goals, with a 66% increase in brand consideration (objective 1), a 52% increase in awareness of the phone's KSP (objective 2) and a 40% increase in people who believed Huawei were a brand that 'gets' British culture (objective 3). We also helped all the animals featured in our film to get their fur-ever homes!

Example sources used: [YouGov](#), [Fly omnibus research](#), [social listening](#), [desk research](#)

CHAPTER FIVE: Common Challenges for planning

There are a number of challenges in embedding a planning culture – and ‘culture’ is an important word to use. Even with fantastic models and frameworks, strategy & planning is not easy. It’s hard-work, it’s detailed, it’s frustrating, it’s about deciding the best answer from many potential ones. People need to have the right tools but also the right attitude and support around them and a shared desire to continually improve.

Here are five common challenges, with examples and advice on how to overcome them.

CHALLENGE 1: NOT ENOUGH RESOURCE

It can be really tempting to just ‘get stuff done’, whether it’s because you feel you don’t have time for a research phase, you don’t have enough team members to dedicate to the planning process or you don’t have any budget for research, insight, data tools or analysis. Much like with measurement & evaluation, doing something towards planning is better than doing nothing at all. Though it may be tempting to say “money we spend on research is money we can’t spend on an activation”, remember Alex Aiken’s comments on just “sending out stuff”.

EXAMPLE

If you were a small charity dedicated to helping people report their experience of domestic violence, you might not have enough money to do primary research to better understand attitudes towards domestic violence, the most influential media titles on your audience or which of your potential campaign ideas might perform best. However, you could use some desk research to help guide you. For example: manually looking at social media posts and hashtags to understand conversation, desk research to look at opinion leaders (eg MPs, celebrities or other influencers) who are vocal about tackling domestic violence and could become your advocates, speaking to a focus group of your service users to understand which of your campaign ideas they feel would best resonate, seeing whether visits to your website tend to come from coverage on certain media titles or via search. This would help you plan better than if you did no research.

TOP TIPS

Even if you don’t have any research budget for your own primary research, there is a wealth of information available, ranging from market and thought leadership reports, to news stories to social media conversation and hashtags that you can use to find out a little more information.

Equally, the organisation you’re working for can often be sitting on a range of data that you could use for planning. Good examples include: R&D data, website/search analytics, social media conversation, customer hotline calls, customer or member surveys. Finally, there are a lot of excellent free tools, such as Google search trends, Google Analytics and answerthepublic.com that you could employ.

CHALLENGE 2: BAD OBJECTIVES

One clearly stated, measurable objective is worth ten vaguely and poorly stated goals. It is much more helpful to concentrate on a SMART communications objective, which is clearly linked to a SMART commercial objective goal.

EXAMPLE:

Here is what we mean by a smart commercial objective linked to a smart commercial objective. Let’s say a car manufacturer wants to be #1 in safety. Here’s how they’d turn that from a goal to SMART objectives: **“Be the undisputed leader in safety amongst car manufacturers” [Goal]**

Becomes:

As part of our growth plan, become the undisputed leader in safety amongst car manufacturers by increasing our #1 position in safety on our industry brand tracking by 10% during 2020 [Organisational objective]

Translated to:

Increase endorsement of our safety credentials by key media and influencers by 30% during 2020, on our tracking study [Communications objective]

Sujit Patil of Godrej presented an excellent example of aligning his team’s communications objectives with commercial goals at the AMEC Summit in Barcelona:

“We consciously aligned PR & Communications objectives to business goals” **Sujit Patil, Godrej**

BUSINESS GOAL	PR & COMMUNICATION OBJECTIVE
PRODUCT / SERVICE SALES	AWARENESS & PERCEPTION
INCREASE MARKET SHARE	BRAND PREFERENCE
ENHANCE CORPORATE REPUTATION	ALIGNMENT BETWEEN AUDIENCE PERCEPTION & DESIRED REPUTATION
EMPLOYEE RETENTION	EMPLOYER BRAND
CRISIS MANAGEMENT	DECREASE NEGATIVE IMPACT ON REPUTATION
INCREASE MARKET CAP	POSITIVE SENTIMENT
HIGHER VALUATIONS - P / E	IMAGE BUILDING, BRANDING

TOP TIPS

If you’re given multiple objectives – consider and counsel as to which is the most important right now. You might have to have more than one objective over a year – if so, prioritise them

If you get an objective with no benchmark or target or timeframe, ask for the missing info!

If you feel you’re being asked to meet an objective that isn’t best suited to being addressed by your marketing communications discipline/ channel, say so. For example, if the communications objective was to “Increase the opening rate of our monthly e-newsletter”, this probably wouldn’t be something you’d solve via PR.

CHALLENGE THREE: LACK OF REAL INSIGHT

A bugbear for agencies is when the box marked 'INSIGHT' on the brief really isn't one. An insight is not just an observation. You are literally looking for that lightbulb moment where you see something that you hadn't seen before and it helps you understand what's causing the problem. From this it becomes easier to define your strategy and to measure and evaluate your impact.

EXAMPLE:

A great example of a true insight was presented by Hotwire's Barbara Bates in 2018's AMEC Measurement Month. Let's paraphrase it as: "Why you could sell vitamins to elephants... but you don't need to."

The story goes that a vitamin company wanted to grow by increasing its pregnancy vitamins' business. So there's a clear challenge: we need to sell more vitamins to pregnant people.

But that creates a problem: you can't make people be pregnant for longer and although you could set out to encourage more people to get pregnant that would be a bit...weird. Equally, elephants are pregnant for much longer than humans. You could start selling your vitamins to them...but it might put the original audience off.

The actual insight (or 'foresight' as Barbara brilliantly called it) was two-fold:

1. People are trying to get pregnant for an average of 2 years, vs being pregnant for 9 months
2. Certain vitamins and minerals are more effective in the first 6 weeks gestation – ie before many people realise they are pregnant

Therefore, the strategy was to focus on those trying to conceive and convince them of the benefits of pregnancy vitamins. In doing this, the potential window for purchase was extended from 8 months to 2+ years.

TOP TIPS

Where might insights be hiding?

In big data – analysing very large datasets can help you see patterns of audience behaviour.

In experts' minds – speaking to experts can short-cut you to a better understanding of a problem and an audience.

In books and academia – research from a totally different field can help you look at the problem you're tackling in a new light.

In talking to your audience – complementing tools research (TGI, GWI etc) with speaking to the target audience in focus groups or via quantitative research can provide new perspectives and understand the 'why' behind an observation you've made.

In media, the influencer landscape & trends – understanding and analysing conversation topics can provide insights to base your approach or – to counter!



CHALLENGE 4: SHORT-TERMISM

Short-termism happens when objectives are set for communications without them being linked to the brand's strategy and a bigger commercial or organisational objective and when metrics focus on short-term outputs rather than on creating eventual, long-term impact. Unfortunately, this seems to be increasingly common, perhaps due to a combination of increased financial pressures, shorter marketing tenures and the rise of digital media with short-term metrics at the touch of a button.

Peter Field spoke on 'WARC Wednesday' at the Cannes Festival of Creativity 2019 about the dangers of short-termism and the fact that creatively-awarded work is now no more effective than non-awarded work. In WARC's article on the matter, he states: "This collapse in effectiveness can be explained largely by the shift to short-term activation-focused creativity and the strategic and media trends this has promoted. We have known for many years that creativity delivers very little of its full potential over short time frames, yet the trend to short-term, disposable and ultimately inefficient creativity continues." Whilst Peter Field and Les Binet's work focuses mainly on advertising, perhaps this should also provide a warning to other marketing communications – anything we do should be part of a wider, long-term plan, otherwise it becomes potentially meaningless.

FICTIONAL EXAMPLE OF SHORT-TERMISM:

An organisation decides to adopt rainbow branding on its consumer products to mark PRIDE. They do this with the aiming of achieving editorial news coverage in the short-term. However, the organisation:

- Has not set itself an organisational objective about diversity and inclusion
- Doesn't support the PRIDE movement for the rest of the year
- Has not contributed to the charity
- Has not identified any desired out-takes, outcomes or impact of its activity beyond a large volume of news coverage

Conclusion: Short-term fame but probably long-term pain!

TOP TIPS

Short-termism is not necessarily about the length of the activity – it's about whether or not the activity is being planned thinking about long-term objectives and a long-standing position.

It's also about whether its impact is being evaluated in the long-term.

To try to avoid short-termism, ask for the bigger picture on a brief or communications objectives.

Always aim to tie your activity back to the organisation's strategy and to ensure it's in keeping with the brand's long-term position.





CHALLENGE 5: POOR MEASUREMENT & EVALUATION

As we covered in Chapter 1, planning goes hand in hand with measurement and evaluation. You cannot plan if you don't first understand the situation you're currently in or what needs to be changed, from x point to y point in order to achieve z.

FICTIONAL EXAMPLE:

If a brief from a toothpaste brand just said: "Make more kids brush their teeth" you're never going to be able to measure and evaluate your impact properly because your starting point, desired change and how this will be measured is unclear.

You need to know: how many kids aged 3+ brush their teeth for the recommended 2 minutes twice a day in order to be able to measure and evaluate a change in frequency and/or duration and what source/s you will use to measure the impact of your communication plan on the desired behaviour.

TOP TIPS

Always ask for more information to make your briefed objectives SMART. Organisations are often sitting on far more data and information than they put in a brief and often will not provide benchmarked objectives.

Take a tip from GCS and ask **WHAT** the organisation wants the audience to **DO**.

Start with what success will look like – how will you know that any strategy and implementation plan you devise has worked?

Remember to use the AMEC IEF to ensure you have best practice measurement beyond mere outputs.

A re-cap of the difference between outputs, out-takes, outcomes and impact:

OUTPUTS	OUT-TAKES	OUTCOMES	IMPACT
<p>Outputs include:</p> <p>Publicity information</p> <p>Website, blogs, partnerships or supplements</p> <p>Events held</p> <p>Sponsorships launched</p>	<p>Out-takes are your target audiences' initial responses and reactions to your communication. These may be interim steps towards your objectives, not necessarily achievement of your objectives. Out-takes may include evidence of:</p> <p>Audience attention e.g. unique visitors, views, clickthroughs</p> <p>Awareness e.g. recall</p> <p>Understanding e.g. comments, post-campaign survey data</p> <p>Interest and liking e.g. likes, follows, shares, retweets, pins, etc.</p> <p>Engagement e.g. return visits, subscribing, positive comments</p> <p>Consideration e.g. comments, subscribing, registering, etc.</p>	<p>Outcomes are the effects that your communication had on your target audiences that align to your objectives. Examples of outcomes of communication can include:</p> <p>Learning / knowledge e.g. through survey or interview data, quizzes, tests</p> <p>Trust e.g. increased trust ratings in surveys</p> <p>Preference e.g. stated preference in surveys, social media comments</p> <p>Intention e.g. through inquiries, registrations, trialling, survey data</p> <p>Attitude change e.g. through survey or interview data</p> <p>Complying behaviour e.g. sales, donations, driving safely; voting, etc</p> <p>Advocacy e.g. endorsements in online comments</p>	<p>Impact is the ultimate follow-on results related to your objectives which your communication achieved or contributed to. Impact can include:</p> <p>Reputation improvement (recognised as an intangible asset)</p> <p>Relationships established or improved (also recognised as an intangible asset by the International Integrated Reporting Council)</p> <p>Reaching targets e.g., sales revenue, fundraising or membership targets, health campaign targets such as smoking reduction, etc.</p> <p>Increased staff loyalty and retention i.e. reduced staff turnover and recruitment costs</p> <p>Organisational change e.g., insights to inform future strategy, realignment of policies to stakeholders</p> <p>Social change e.g., improved health and well-being, increased access to information, etc.</p>

To deliver effectiveness, you should see outputs, out-takes, outcomes as a chain – one leads to the next and together they help to deliver the desired impact.

For anyone interested in further best practice, AMEC has published a detailed taxonomy of evaluation, authored by Distinguished Professor Jim MacNamara Head of Discipline – Public Communication, School of Communication, University of Technology Sydney.

REMINDER:

As we saw in Chapter One, planning includes effectiveness. Measurement and evaluation must be part of any campaign planning process, at the beginning (knowing what success will look like), during (knowing if the strategy and tactics are performing as expected) and the end (clearly evaluating what changed as a result of the strategic communications plan and how that impacted the organisation).

Any business will have a long-term strategic plan, usually for three years and sometimes for five or ten. Any activity should be planned with this in mind – planning should be seen as a continuous process.

CHAPTER SIX: Considerations for different types of strategy & planning

Strategy is a word bandied about so often it can easily lose meaning. There's a business strategy, a brand strategy, a campaign strategy, a media strategy, a social media strategy...and more. But however many strategies there might be, they should all follow the same principles outlined in Chapter One:

Without a clear understanding of who you're trying to reach, why, and what you want them to do, how can you know what you should be saying, where and when?

And without an understanding of your current situation and your ambition of where you need to get to and how you'd know you'd achieved it, how can you measure and evaluate whether it's been effective?

Here is some specific advice on some other types of strategy that might sit within an overall strategic communications plan:



Social media strategy – Darika Ahrens,
Digital Director,
ENGINE MHP

Your social media strategy should outline:

- The channels which are most important and relevant to reach your audiences
- Content which meets audience needs while delivering your message - excellent content is referred to as thumb stopping. Remember your content is not just competing with competitor feeds; but everything people are scrolling through on social day in and day out
- How the content will adapt in each channel
- How content will be distributed e.g. Paid, Earned, Shared/Influencer, Owned channels activated
- Relevant metrics which relate back to the communications objective (the AMEC Integrated Evaluation Framework offers great guidance here)

TOP TIP

REMEMBER! Our no. 1 watch out is on channel choices. For some reason, even though communications professionals would never leap to pick a channel first like "We need a radio campaign", when it gets to social media, the temptation is often to start with a social channel based on no research, insight or rationale and build out a strategy from there.

Your influencer marketing strategy should outline:

- Why influencers are necessary to deliver against the wider 'big idea' and strategic communications plan
- The influencers that are most crucial to connect with and/or influence your audience
- The content you are aiming for each influencer to share via their own channels or a third party channel (eg editorial media, radio etc)
- How this content ladders back to your campaign, communications and organisational objectives
- Any requirement, considerations and regulations to bear in mind
- Measurement metrics and evaluation



Influencer marketing strategy – Lucy Hart,
Digital Director,
ENGINE Mischief

TOP TIP

REMEMBER! Influencers do not just = 'YouTubers'! Influencers could include: editorial media, experts, academics, opinion formers, celebrities, social media stars, superfans.

Your media relations strategy should outline:

- The media that are key for connecting with your audiences
- The role of the media in the phase of the campaign
- The key messages you aim for the media to deliver
- The type of content you are crafting for specific media, to take into account the right style and format for them
- How this content ladders back to your campaign, communications and organisational objectives
- Measurement metrics and evaluation



Editorial media relations strategy – Daniella Graham,
Senior Strategist,
ENGINE Mischief

TOP TIP

REMEMBER! Tools like TGI or Cision as well as the media industry's trade websites can help you find information on the best media through which to reach your audience.

This guide will hopefully have provided a helpful introduction to - or refresher on - what planning is, why it's important for PR and how to incorporate planning into your organisation.

Key take-aways:

- 1. Avoid Assumption.** Budget whenever possible for insight and research so you truly understand the challenge you're facing and the best way to tackle it. If budget is not available, use desk research or information that the organisation already has.
- 2. Start with the problem.** A clearly defined problem helps you get to a clearly defined solution.
- 3. Avoid woolly goals.** Ask for data (invariably, someone is sitting on plenty). Think SMART objectives and prioritise the most important and useful ones for communications to tackle now, next, and then.
- 4. Understand your audiences.** The audiences are key to achieving your objectives – what do you want them to do and why? Who influences them? Without considering the audience, your plan might make sense but it may not be effective.
- 5. (Problem + Insight) x (Strategy + Scoring + Creative) = Solution.** If you can get these things clearly defined and know how to measure if they're working, that's your strategic communications plan.
- 6. Be guided by your plan(ning).** Don't do all the hard work, write it and then let it gather dust! See it as a set of guardrails for making crucial decisions, like your media choices, key message briefings, whether to say yes or no to spending time and money on something.
- 7. Pollitt was clear: Effectiveness is everything.** AMEC recommends you budget at least 10% of your costs budget for measurement and evaluation. Add this to your budgeting process to give every colleague a nudge.
- 8. Don't stop at the end – improve!** Planning is a continuous process of getting closer to your objectives in the best, most creatively effective way.

Appendix & further reading

For anyone now inspired to find out more, the following is also a helpful, not exhaustive, list of where to seek further points of view:

- Pollitt on Planning <https://www.amazon.co.uk/Pollitt-Planning-Stanley/dp/1841160520>
- Behavioural economics <https://www.behaviouraleconomics.com/resources/mini-encyclopedia-of-be/>
- OASIS & GCS campaign planning Resources <https://gcs.civilservice.gov.uk/guidance/campaigns/guide-to-campaign-planning-2/>
- The guide to setting KPIs, measurement and evaluation that AMEC and ENGINE produced for ISBA, with help from the PRCA and PRWeek
- The AMEC case study bank, where you can see a variety of inspiration and best practice
- APG website including a glossary of different types of strategist – from Brand Strategist to Experience Planner – and different models, frameworks and advice
- ENGINE | MHP guide to strategic communications in The Networked Age

A note on other planning frameworks and models:

- POSTAR: This model forms the basis of the PRCA's planning training course in the UK. It is similar to OASIS, standing for: Position, Objectives, Strategy, Tactics, Administration, Results. The CIPR also provides a framework for its members
- SCOTSTTBE– situation, considerations, objectives, target audience, strategy, tactics, timing, budget, evaluation. The SCOT section covers the initial account planning elements – TT is about writing your actual plan and BE is about effectiveness
- THE DUBLIN CONVERSATIONS - following 'the Dublin Conversations', 'Comms Canvas' – a new model providing 5 simple rules for "any brief, strategy or campaign" has recently been unveiled. Follow PRCA and CIPR trainer Andy Green (@andygreencre8iv on Twitter) and PR Institute of Ireland's Padraig McKeon (@PadraigMcKeon) for more information.



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ENGINE | *mischief*