How To Write A Comprehensive Public Relations Plan: Part 1

By Craig Miyamoto, APR, Fellow PRSA

The public relations plan is one of the most important documents you will produce in your career. It has been said that public relations is the result of form and substance. While this is not exactly true, it does have some basis when you're trying to persuade your client or boss to let you spend their money. How you say it (form) and what you say (substance) will likely determine your success or failure in getting your proposal accepted.

Let's face it, clients and bosses are impressed by the way things look -- just like you, they're only human. All other things being equal, a well-organized and attractively prepared proposal will win out every time. So, what can you do to help ensure success? Well, there are a number of elements in an effective public relations proposal presentation of which you must be aware. Begin each section with the appropriate subheads:

1. Letter of transmittal
2. Executive summary
3. Situation analysis
4. Problem and consequences
5. Campaign goal
6. Audience identification and messages
7. Audience objectives
8. Strategies
9. Communication Tactics
10. Schedule
11. Budget
12. Evaluation plans
13. Pertinent research
14. Communication samples

Each of these elements is vital. Each plays an important role in building a logical, well-planned proposal. A detailed discussion of each follows.

Letter of transmittal

This item is an adjunct to -- and precedes -- the actual plan. As simple as it may sound, you need to transmit your plan to the client or your boss. Standard accepted business practice dictates that you write a letter or memorandum of transmittal. Limit the transmittal letter/memo to a single page.

If you are submitting the plan to a client, use the following format:

- A cordial opening paragraph stating that you are submitting "the attached plan for XXX campaign, as promised." Follow this with a brief description of the plan, including the campaign's "bottom line" -- income expectations, expenses, net "profit" or loss -- in other words, what your client is expected to lay out for the public relations campaign.

- A reference to the executive summary that follows.

- A statement that you either look forward to presenting the plan in person as a previously designated time and place, or will contact the client to arrange a meeting to discuss the plan.

- Gracious words of "thank you" for the opportunity to submit the plan.

> Two caveats: Spell the company's and client's names correctly, and double-check titles and addresses. You don't want two strikes against you before the client gets to the meat of your proposal. If you are submitting the plan to your boss, make sure to economize even further on your words. You can eliminate some of the opening and closing niceties.

Executive summary

> Also an adjunct to the plan, this is a summary of your proposed campaign that covers several key points most likely to interest the executive who reads your plan. Here is a suggested format of the executive summary:

- **The Problem:** State here what you believe the problem to be.
- **Program Goal:** State here what your ultimate goal is.
- **Target Audiences:** (1) Your primary audience, (2) your secondary (intervening) audience(s), and (3) your tertiary (special) audience(s).
- **Audience Objectives:** (1) What you expect your primary audience to do, (2) what you expect your intervening audience(s) to do, and (3) what you expect your special audience(s) to do.
- **Major Strategy:** State your major strategy here, listing the key tactics that you will use in your campaign.
- **Recommended Budget:** State your total anticipated income and sources, your anticipated expenses, and the anticipated net profit or loss.
- **Evaluation Plans:** State how you expect to evaluate (and expect to know) whether or not you've achieved each of your campaign and audience objectives.

Situation analysis

> The very first item in the plan itself should be an analysis of the current situation, based on results of your research. The situation analysis contains all of the information and data you collected about the internal and external environments.

> Depending on how much research is required and has been conducted, and how complicated and/or involved the organization's problems are, the situation analysis can run from one to three or more pages.

> While a problem statement directs the planning effort to a particular set of conditions, the situation analysis provides details about internal and external contexts. It includes a literature review (which requires a bibliography of sources).

> The Situation Analysis: Information To Look For

Internal factors:

- Statements of the organization's mission, charter, bylaws, history and structure.
- Lists, biographical sketches and photos of key individuals -— officers, board members,

and program managers.
- Detailed descriptions of programs, products, services, etc.
- Statistics about resources, budget, staffing and programs.
- Summaries of interviews with key personnel about the problem situation.
- Copies of policy statements and procedures related to the problem.
- Complete descriptions of how the organization currently handles the problem.
- Lists and descriptions of the organization's controlled communication media.

External factors:

- Clippings from newspapers, magazines, trade publications, and newsletters tracing print media coverage of organization and problem situation.
- Reports of radio, television and cable placements.
- Content analyses of media coverage.
- Lists of media, journalists, columnists, and free-lance writers who report news about the organization and related issues.
- Lists and descriptions of individuals and groups that share the organization's concerns, interests, and views (including their controlled print and broadcast media).
- Lists and descriptions of individuals and groups that oppose the organization's positions on the issues (including their controlled print and broadcast media).
- Survey results of public's awareness, knowledge, opinions, and behaviors related to the organization and problem situation.
- Schedules of special events, observances, and other important dates related to the organization and problem.
- Lists of government agencies, legislators, and officials with regulatory or legislative power affecting the organization and the problem situation.
- Copies of relevant government regulations, legislation, bills pending, referenda, publications, and hearing reports.
- Copies of published research on topics related to the problem situation.
- Lists of important reference books, records, and directories, as well as their locations in the organization.

> When you write the situation analysis, present your research findings in a logical and easily understood order. List results of client research, situational research, and audience research. If you have used the suggested outline above, you should have all of the necessary pertinent information you need.

Assumptions

> No matter how much research you've done, something always seems to be missing. If you've done your homework well, you should have no assumptions to present here.

> In some cases, however, assumptions are inevitable and as a practical matter, unavoidable. So, when you write your situation analysis, you may need to make some assumptions about various aspects of the situation. If you must make assumptions, list them in a supplemental section, noting what missing information you can reasonably assume. "A friendly media" is not a valid assumption. Professionals never make assumptions, especially about the news media.

Problem and consequences

> Based on your research, and particularly on your preliminary interviews with the client, you should be able to isolate the overriding problem, and determine what will happen if the problem is not solved.

The problem statement itself should be concise and very specific. If possible, write it in 25 words or less, using standard subject-verb-object order. This step is crucial to your plan and to the success of your campaign. Mess up here and you will end up 'way off course. Think of the problem statement as your starting course to the moon. One degree to the left or right, up or down, and you'll miss the moon by thousands of miles.

It's the same with the problem statement. Identify the wrong problems, and you may as well not even turn in your plan. Get to the root cause of your problem, and try to identify exactly what attitude (what they think) or behavior (what they do) you need to influence.

Do you want attitudes crystallized, modified or reinforced? Be especially conscious of the ultimate behavior you want to evoke. Answer this question: "What exactly is it that we want them to do as a result of this campaign?" And yet, proper problem identification and statement is still not enough. The client may recognize that there is a problem, but unless there is a consequence —- unless the client will lose something of value, whether it be profits, members, or quality of service -- the client may remain unconvinced about your plan.

You must show the client what could result if something isn't done to correct the problem identified above. Explain in one concise declarative sentence what the consequences will be.

Campaign goal

This is not a particularly difficult section to complete. But first, here's a brief review of goals and objectives.

Goals are general directions, somewhat nebulous, that are not specific enough to be measured. Think of the word "go." It has no end. A good example is the signature line of the Star Trek television series: "To boldly go where no man ("no one" in Generations) has gone before." You can't measure it, and you probably will never know if the goals were accomplished, because once humans have gone somewhere, we've been there, and there are still other places to go since the universe is infinite and has no end.

Objectives, on the other hand, are specific and measurable. They can be output objectives, or they can be attitudinal or behavioral. But most of all, they can be measured. They are concise. They are specific. Think of the word "object." You can touch it, it's there, it's actual, it's finite. Back to the goal. State your campaign goal simply and resolutely. State it confidently, with all the bravado you can muster, secure in the knowledge that the question, "Did you accomplish your goal?" can never be answered.

Audience identification and messages

Audience identification is vital to your campaign. You need to talk to the right people. You need to conserve valuable funds, time and manpower, and you cannot do this unless you target your publics carefully.

A word about publics, stakeholders and audiences: A "public" is a group of people with similar interests. "Stakeholders" are a special kind of public, composed of people who have a particular interest (or "stake") in your organization. An "audience" is a public with whom you are communicating.

You need to find some intelligent answers to some equally intelligent questions:

- Who exactly is going to be affected by your public relations campaign? Who exactly are you trying to persuade?

- You're going to need some cooperation from others; who will this be? Where are these people located? How can you find them? How can you get in touch with them?

- The people you want to reach listen to opinion leaders; exactly who are these opinion leaders? Who and where are those credible, authoritative sources that your intended audience believes, and who can help you get your messages across?

- Your audiences generally act the way you do --— they do the same things you do. What magazines and newspapers do they read? What radio stations do they tune in to? What TV shows do they watch? To what clubs and organizations do they belong? What professional associations do they join? What are their favorite charities? What are their children's favorite participation sports?

So how to you reach them? Find out. Do your research. Generally speaking, there are three types of audiences:

- **Primary:** This is the audience or public that you specifically want to influence. It's the people whose behavior you're trying to change. Influence them, and you've done your job well.

- **Secondary:** These are "intervening" audiences. These are people who can intervene on your behalf and influence the primary audience. Convince them that you're right, and they can help you get to the primary audience. You've heard of "third-party testimonials" that are more credible than your direct communication? Secondary audiences are those "third-party" people. Influence the secondary audiences and your job will become a bit easier. Their "endorsement" of your cause serves as their "testimonial."

- **Tertiary:** These are "special" publics composed primarily of organized groups (e.g., clubs, councils, associations) that can mobilize quickly and endorse your cause. They usually have an established means of communication with their membership via newsletters and other media.

In your plan, identify who these people are, then prioritize them. Like the "inverted-pyramid" style of journalistic writing, audience prioritization will allow you to eliminate potential audiences from the bottom-up should the need arise because of budget cuts, time constraints or manpower reductions.

Once you've identified and prioritized your audiences in your plan, tell the client exactly what message you believe should be directed to each of the audiences you have selected. Like the problem statement, your messages should be direct and declaratory, and they should articulate specific benefits to the audiences. Try out a number of messages, then settle on one per audience, selecting the one you consider most important to your campaign goal.

Audience objectives

In this section, state exactly what your objectives are for each audiences you identified in the previous section. In general, there must be at least one objective per audience. This is usually sufficient. In come cases, however, you will have more than one objective for each audience.

- Objectives should measure impact. Behavioral objectives are preferred ("Exactly what is it you want to get them to do?"), but the objectives can also be attitudinal ("What do you want them to think?"), or informational ("What do you want them to know that they didn't know before?").

- Objectives also can measure your output -- what you did. But unless output is central to your problem and contributes to solutions, try to keep these to a minimum.

- State your objectives in specific and quantifiable (measurable) terms whenever possible. Set them in a time frame, and if you know what the budget is, tell the client what you expect the cost to be. The objectives should be reachable, they should be acceptable to the client, and they must be ethical.

- A crystal-clear objective would read something like this: "Our objective is to deliver X results by Y date at a cost of Z dollars." Think of the goals as the treasure at the top of a stairway, and the objectives as the stairs.

Strategies

- In this section, you need to present a number of strategies, each of which will in itself solve the problem. This is one of the hardest sections to complete, especially for inexperienced practitioners who must rely on information provided by others, rather than on personal experience. However, it is so essential to the campaign's success that every effort must be made to present excellent strategic alternatives.

- There are four basic strategies:

  1. Do nothing (inactive).
  2. Do something only if necessary (reactive).
  3. Do something before a problem arises (proactive).
  4. Involve others in solving or heading off problems (interactive).

  It may also be feasible to take a "multi-active" approach to solving the problem, in which case you would use elements from each basic type of strategy.

- Whatever strategy is finally selected, know that it will help determine the success or failure of your proposed program. You may find it easier to select a strategy after reviewing the list of public relations initiatives (tactics, activities) that you will develop after conducting a number of creative brainstorming sessions.

- Do not -- repeat, do not -- use the terms "inactive," "reactive," "proactive," "interactive," or "multi-active" in your plan, unless the client fully understands the terms and initiates their usage. The words can be considered public relations jargon and often are meaningless to the client. Don't use these words as crutches in an attempt to avoid explaining your strategy in detail.

- State that each strategy, when considered on its own merits independently of the other alternative strategies, is a viable option to be judged on its own strengths, and will definitely solve the problem. Eliminate any approach you believe will not solve the problem on its own. If a combination of approaches can solve the problem, list the combination as a strategic alternative.

- Each alternative strategy will attain all of the objectives listed earlier. Again, each individual solution must be feasible, appropriate and acceptable. All possible solutions should be

considered and presented -- unless, of course, your particular problem is one of those rare cases that has but a single solution. No, strike that notion. Don't be tempted by this intriguing possibility. Assume that your problem has two or more solutions.

- Discuss all of the pros and cons of each strategy considered. In doing so, try to offer options to the client. If you can identify business risks and opportunities, you give the client an opportunity to exercise informed judgement. Clients need viable options -- they need to know each option's advantages and disadvantages -- in order to make decisions based on fact instead of emotion.

- Clients don't want to "shoot from the hip." They want to make rational decisions. Remember, you must take careful aim in everything you do in public relations. Don't shoot from the hip: you could end up with powder burns on your butt.)

- Finally, tell the client what your recommended approach or strategy is. Be sure to tell the client why you recommend this particular strategy, and be prepared to defend your choice under withering fire and challenge from the client. You can't fake this part. It may be helpful to refer to the pros and cons you listed for each strategic alternative.

How To Write A Comprehensive Public Relations Plan: Part 2

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Introduction

- In Part 1, we talked about writing your transmittal letter, executive summary, and situation analysis. We also stressed the importance of identifying the correct problem, setting your campaign goal, identifying your audiences and selecting the proper messages, adopting specific and measurable objectives, and setting a strategic course of action.

Communication tactic

- This is the section in which you tell the client exactly what communications initiatives you propose. If you have conducted some creative brainstorming, you should have developed a "shopping list" of possible tactics that will achieve your previously stated objectives. Look at each tactic from the standpoint of what it will do to achieve your objectives.

- Your tactics will include:

Action events:
Non-written tactics such as special events, demonstrations, exhibits, parades, community contributions (manpower, talent, advice, money) and other non-verbal activities. Separate your action events into message tactics (which will be used to get your message across to the audience) and media tactics (how you will utilize the news media to publicize your action events).

Communication tactics:
Verbal tactics (oral and written) that use words or pictures. These include newsletters, flyers, news releases, brochures, direct mail, advertising, themes, slogans, the Internet, and other

initiatives that use words and language as their basis. As with your action events, separate communications initiatives into message tactics (which will be used to get your message directly to the audience), and media tactics (how you will utilize the news media to communicate your messages).

> When presenting your tactics in this section, be sure to provide a brief one- to three-paragraph description of each tactic, especially noting the audiences to which the tactic is directed, the message you expect the audience to receive, your reasons for selecting this particular tactic (cite your research, focus group results, etc.), and the anticipated results.

Schedule

> You must show that you have thought through the plan to the smallest details. In this section, present your planning calendar. Be specific and comprehensive. Include specific dates whenever possible. Tell the client exactly when you're going to conduct the action events and communication tactics you noted earlier. Also, tell the client who will be doing the work.

> List milestones and deadlines for each of the events and tactics. Plan writers always note when communication products and activities will culminate, but often forget milestones and deadlines. For example, don't just say that a brochure will be delivered to the office on July 17. You must also include milestones and deadlines, and let the client know that initial copy drafts are due on May 2, that three days are required for initial editing, that second drafts are due on May 10, that two more days are required for editing, that the final draft is due on May 17, and that final copy approval is due on May 19.

> The client also must know that final copy is due at the typesetter on May 21, that the graphic designer needs two weeks to work on the design, that the printer needs the camera-ready art and layout by July 1, and that a minimum of 10 days is required before the printed brochure can be placed on the client's desk.

> Each of the dates above should be included in your schedule. Do this for each initiative. You may either present a separate calendar for each tactic, or combine them into a comprehensive timetable. Ideally, you should do both. Don't forget to correlate once again the events with the audiences you expect to address, and what you expect to accomplish.

> Finally, don't forget to include any research you will be conducting, as well as on-going and end-of-project evaluation dates.

Budget

> Putting a budget together is especially difficult when you are working on a hypothetical case, or if you are not sure of the client's requirements ("Why don't you present three scenarios -- minimal, moderate and optimal -- and we'll pick the one we can afford").

> This may seem incredible, but the client often has absolutely no idea how much is available for your campaign. More often than we suspect, the client may simply be "fishing" for a cheap way to obtain some publicity for the company. Or, the client may want to know how much a pet project would cost if it were done correctly. That said, you must have a budget section. You must have an accurate representation of how much things are going to cost. The information may be close at hand (e.g., previous experience, other plans, informative co-workers), or...you may have to make a lot of phone calls.

> Separate your anticipated income from your proposed expenses, and present both totals.

Finally, give the client a bottom-line figure. Tell the client exactly what the campaign is going to cost. An excess of income over expenses will result in a profit to the client; an excess of expenses over income will result in a cash outlay by the client. Now...don't you wish you had taken accounting in college?

Evaluation plans

> If you have planned your campaign correctly, your communication and action tactics will have been performed according to schedule, and will have cost exactly (or pretty close to) what you said they would cost. You will have reached all of your identified audiences and persuaded them to do exactly what you wanted them to do.

> You would have attained all of your objectives, which ultimately means that you have achieved your primary goal. And, if it is not too bold to say, you will have solved the client's public relations problem, and those dire consequences you predicted earlier will not come to pass.

> But how do you know whether or not you've succeeded? You must measure your accomplishments. How do you measure those results?
> You do it by measuring two phases of your campaign:
>
> **Impact:** Ask yourself what behavioral or attitudinal changes the campaign effected. Impact measurement documents the extent to which you achieved the outcomes spelled out in your objectives for each target public. It also tells you to what extent your overall program goal was achieved.
>
> **Output (or implementation):** In other words, what did you DO? How much effort went into carrying out the campaign? How many publications and releases were prepared and distributed? How many column inches and minutes of air-time coverage did you get? How many people were exposed to your message?

> Emphasize impact -- impact is paramount. Emphasize output only if the communications "products" are central to your problem and contribute to solutions.

> Tell the client exactly how you are going to measure the results of what you did, and how they relate to your objectives. Remember, you cannot evaluate effectively unless you have good objectives. If you don't have good objectives, then you have nothing to measure against.

Pertinent research

> Create a "Tab A" and submit your research results. In this section, include client, situational, and audience research results (clippings, polls, interviews, library research, or summaries of research found elsewhere -- with appropriate source identification). Include anything you deemed essential while compiling your situation analysis.

Communication samples

> Create a "Tab B" and include descriptions and/or rough layouts of recommended communications materials (i.e., news releases, public service announcements, speech outlines, statements, institutional ads, brochure dummies).

> For each news release, list names of news organizations to which they will be delivered, and their deadlines. Be sure to use a wide variety of communication channels and methods, properly timed and coordinated.

> Remember also that actions and events generally are more effective than written or oral communications alone. You should strive to keep verbal communications to a minimum, and make imaginative and creative actions and events a key part of your campaign.

A last word

> Finally...
No typos. Bind all work neatly. Personalize the transmittal letters if you know the names of the selection committee members. Use a computer and laser printer. Meet deadlines. Use an easily readable font typeface (minimum 12-point font). Use good paper, don't skimp.

> Remember: The "class" projected by your proposal is reflected in the perception that the client has on your "excellence" as a public relations professional.

> Look professional, and you will be viewed as professional.