

# The Four-Step Process

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Different organizations and different authors use different acronyms: **RPIE**, **RACE**, **PPAE**, etc. Whatever you call it, public relations planning is typically addressed as a four-step process.

- Research
- Planning/Analysis
- Implementation/Execution/Communication
- Evaluation

*Tip:* Start at the beginning. Don't rush to solutions or jump into tactics before research and objectives.

## Step 1: Research

Research is the systematic gathering of information to describe and understand a situation; check assumptions about publics and perceptions, and check the public relations consequences. Research helps define the problem and publics.

- WHO do we want to reach?
- WHAT do we want them to DO?
- WHAT messages do we want to communicate to each public that will:
  - Encourage desired behavior?
  - Increase knowledge?
  - Change attitudes?

## Research Terms

- Primary or secondary
- Formal or informal
- Qualitative or quantitative
- Scientific method

## Research Methods

What are some research considerations? (Know advantages, disadvantages and appropriate application for each.)

- What decision will be made from the research, and what information is required to support the decision?
- Available resources?
- What other parts of your organization have already done research you could use?
- Does sample selection give you an accurate assessment of your target population?
- Size of sample and universe/population?
- How will you collect data—survey, telephone, mail-in, on-line?
- How much time do you have?
- How scientific do you need to be; what level of confidence do you need to have in the data?
- What questions will you ask?

- How will results be used? Will the results be used internally only, or will results be made public?
- How will you tabulate your answers?

## **Step 2: Planning (goals, audiences, objectives, strategies and tactics)**

*Tip:* The 10 steps for writing a public relations plan will give you the framework to assess any PR situation. Even if you're faced with a case study from an industry with which you are not familiar, walking through these 10 steps can help you look past what you don't know and effectively apply your knowledge, skills and abilities.

**Goals:** These refer to longer-term, broad, more global, future statement of "being." Goals may include how an organization is uniquely distinguished in the minds of its target publics.

*Example:* To become the recognized leader, foster continuing public support, etc.

**Objectives:** There is a focus here on shorter-term, defines WHAT behavior, attitude or opinion you want to achieve from specific audiences, how much to achieve, and when to achieve. Objectives should be: Specific, Measurable, Attainable, Audience Specific, Relevant, Results (Outcome) Oriented, Time-Specific.

- Create basis for evaluation
- Include time-frame
- Include level of behavioral/opinion change (awareness, attitude, action)
- Include publics affected

**Outcome objectives** change behavior, awareness, opinion, support. Outcome objectives require high-level strategic thinking. "Differentiate between measuring public relations "outputs," generally short-term and surface (e.g. amount of press coverage) and measuring public relations "outcomes," usually more far-reaching and carrying greater impact (changing awareness, attitudes, and even behavior) (Seital, 2001, 145).

**Process objectives** serve to "inform" or "educate."

**Outputs** measure activities, e.g., number of contacts or news releases. Output can help monitor your work but have no direct value in measuring the effectiveness of a campaign.

**Strategies:** These serve as a road map or approach to reach objectives. (This includes communication strategies that target publics for change and action strategies that focus on organizations' internal changes.)

- Strategies describe HOW to reach your objectives.
- Strategies include "enlist community influentials to..." "accelerate" and "position."

**Tactics/tools:** These serve as specific elements of a strategy or specific tools, more specifically "how to."

- Examples include meetings, publications, tie-ins, community events, news releases, etc.
- Activities are details of tactics: six meetings, four publications, etc. Activities have dates, indicate who is in charge, attendance expected, etc.

## **Step 3: Implementation: Execution of the plan or communicating.**

- Actual messages sent through what channels?
- How many reached targeted audiences?
- Monitoring tools for execution?

## **Step 4: Evaluation**

- Measure effectiveness of the program against objectives.
- Identify ways to improve and recommendations for the future.
- Adjust the plan, materials, etc., before going forward.
- Can serve as research for the next phase or program.

## **How the Four-Step Process is Assessed for Accreditation**

### **Readiness Review**

- Readiness Review Questionnaire
- Readiness Review Presentation (includes presentation of a public relations plan, other work samples that relate to this plan and an opportunity for panelists to ask questions based on your Readiness Review Questionnaire)

*Note:* See Candidate's Readiness Review Instructions via the [Links You Can Use](#) page. Not only does the Readiness Review Questionnaire require you to discuss a public relations plan but the instructions also ask you to include this plan in your portfolio and panelists are likely to ask you to discuss your involvement with it.

### **Computer-based Examination**

The computer-based Examination presents scenarios and requires you to apply your knowledge, skills and abilities with the four-step process to arrive at the most appropriate answer. The case studies in this study guide are intended to help you further develop your competencies in these areas.

### **Research**

- Can you identify and select the research approach, methodologies and information-gathering needs that support planning decisions?
- Can you differentiate research methodologies: primary, secondary; formal, informal; qualitative, quantitative?
- Do you know how to apply definitions, examples and characteristics of different types of research?
- Do you understand time and budget constraints for various methodologies?
- Are you familiar with sample size? Costs, characteristics, etc., can help you identify the most appropriate research methodology for a particular situation. *Example:* If an issue requires information from legislators or CEOs, a survey is not the best tool. By knowing the characteristics or disadvantages of surveys, you know that personal interviews may be your most valid research method.

### **Planning**

- **Audience:** Are you able to identify and prioritize audiences and segments of those audiences? For instance, employees are an audience; management is a segment of the employee audience. Some audiences are more important than others. Can you select the most important audience on a brief scenario? Do you know why this audience is important?
  - For the public relations professional, there is no such thing as "the general public." Our total audience is composed of groups of publics with whom we can communicate.
  - In determining the most important audiences, ask whether the audience/public can help your organization achieve its goals and objectives, hinder your organization in achieving its goals and objectives, or hurt your organization in some way.

■ **Goals, objectives, strategies, tactics:** Can you differentiate among the four?

*Example:* Given a well-written objective, two very strong strategies or tactics, and a weaker or poorly written objective, would you be able to select the most appropriate objective?

**Example objectives:**

- a. *Weak:* Enhance our public image.
- b. *Stronger:* Improve recall of 10 important facts about our organization—from three to five—among key media representatives by June 1 of next year.
- c. *Weak:* Improve media relations.
- d. *Stronger:* Increase by 10 percent—from 60 percent to 70 percent—positive coverage on 10 key issues by the end of the year.

**Example strategies:** These include media relations, public engagement, employee engagement, third-party endorsement, engage opinion leaders; celebrate success among early adopters; position the organization or its products; correction/clarification; viral online communication; information/education targeted at decision-makers, etc. *Examples of what is not a strategy:* Holding a news conference, sending a newsletter, hosting a meeting (or series of meetings); writing a news release; planning a special event, etc. These are tactics.

**Messages and spokespersons:** Given a very brief scenario, can you identify the most appropriate message and spokesperson? This level of knowledge can be developed in two ways: 1) Professional experience and 2) studying others, e.g., case studies in the texts, businesses or issues in the media, etc. The following principles guide our professional judgment in message development and identification of a spokesperson.

- Public relations' responsibility to act in the public interest
- Ethical responsibilities of honesty, accuracy, fairness and full disclosure
- Ethical responsibility to our client or employer
- Organization mission, values, goals and objectives
- Plan or program objectives to influence awareness, attitude or actions
- Desire to build mutually beneficial relationships
- Spokesperson's credibility, importance, likeability among key audiences
- Understand the needs, interests values and concerns of target publics
- Appreciate target public perceptions of risks and threats

**Tactics and tools:** Considering a range of options, can you determine the most appropriate use of tactics? Can you identify those that should be included in a plan? Listed below are criteria to consider in evaluating tactics.

- Available time and resources
- Ability to reach and influence target audiences to achieve desired objectives
- Compliance with ethical and legal guidelines
- Return on investment
- Multiple methods, multiple touch points to reinforce consistent messages

**Budget:** Do you understand budgeting? Do you know what to include in a budget, e.g., staff time, materials, etc.

## Evaluation

Are you able to make judgments about appropriate use of evaluation? Can you link evaluation to specific audiences and objectives?

- o Evaluation of success is only as good as the quality of the objectives.
- o Every objective should include a statement of how its accomplishment will be measured—both criteria and tool.
- o Understand the differences between measuring outputs, out-takes, outcomes. Outputs and out-takes are measures of execution and strategy. Outcomes are measures of achieving objectives.
- o Measurement should be included in the plan and budget (otherwise, it won't be done).

Adapted from Texas Public Relations Association Jumpstart, 2006.

## Additional Resources

Broom, G. M. (2009). *Cutlip and Center's effective public relations* (10<sup>th</sup> ed.). Upper Saddle River, NJ: Pearson Prentice Hall. (See chapters 11, 12, 13, 14.)

Lukaszewski, J. E. (2007, September). *Gaining and maintaining public consent: Building community relationships and overcoming opposition*. Public Relations Tactics. Retrieved June 17, 2010, from <http://e911.com/monos/articles/Tactics-Gaining-& Maintaining-Public-Consent-09-07.pdf>

Lukaszewski, J. E. (2007.) *Gaining Public Consent : How to build community relationships and overcome opposition* (January/February 2008). All rights reserved. Reproduced with permission of the author. Retrieved June 17, 2010, from <http://e911.com/monos/articles/California-Builde-Gaining-Public-Consent-January-2008.pdf>

Lukaszewski, J. E. (1991.) *Managing Fear: Taking the risk out of risk communications*. Presented before the Edison Electric Institute, Washington, DC, October 25, 1991. Retrieved June 17, 2010, from <http://e911.com/speeches/08%20-%20Speech,%20Vital%20Speeches%20of%20the%20Day,%20Managing%20Fear,%2002-01-92.pdf>

Newsom, D., & Haynes, J. (2011). *Public relations writing: Form & style* (9<sup>th</sup> ed.) Boston, MA: Wadsworth, Cengage Learning. (See chapter 5, The Public Relations Planning Process.)

Smith, R. D. (2009). *Strategic planning for public relations* (3<sup>rd</sup> ed.). Mahwah, NJ: Lawrence Erlbaum. (See Phase 2 on Strategy.)