

Writing a Public Relations Plan

Tip: These 10 steps for writing a plan follow the research phase. Begin here after you decide what you want to accomplish and identify the things you want to correct, prevent or preserve.

1. Overall Goals for Public Relations

- Keep these few in number. Identify no more than three to five. One may be enough.
- Be consistent with management goals and mission.
- Think in terms of end results, not process alone.

2. Target Audiences or Publics

- Groups or sub-groups with which you need to communicate (talk *and* listen).
- Consider the following.
 - Who needs to know or understand?
 - Who needs to be involved?
 - Whose advice or support do you need?
 - Who will be affected? Who has something to gain or lose?

3. Objectives for Those Audiences

- Think in terms of the awareness, attitude or action you desire—not the process but the end result.
- Articulate with verbs that reflect changes in awareness, attitude, or behavior: Recognize, acknowledge, know (awareness); Favor, accept, oppose, believe (attitude); and Purchase, participate, endorse, discard, write, visit (behavior).
- Phrase objectives in terms of specific results you desire, and what you think is possible.
- Each objective should cite an audience, outcome, attainment level (%) and time frame. (*Example:* At the end of six months, 65 percent of employees will be in a car pool or ride-share program.)
- The same objective may fit a number of audiences but strategies may need to be different.
- Consider what position you want to occupy in the mind of your audience or target publics. How should the organization, product, issue, or cause be known or perceived by the target public, and how that position will be distinct.

4. Strategies

- The military definition is the science and art of employing political, economic, psychological and military forces to support policies or achieve goals; to meet the enemy under advantageous conditions.
- In planning, how will you approach the challenge of working toward your objectives? On what can you build or take advantage in your situation? What devices will you employ?
- Your strategy may describe the diplomacy, psychology, philosophy, themes and appeals you will use, or the message you will convey.
- It may describe how you will work with community groups.
- You probably will have several strategies for an objective.
- Some strategies may serve several objectives.

- Vehicles or channels you will use to communicate can appear here, or in tactics or activities.
- Examples include media relations, third-party endorsement, and public engagement.

5. Tactics

- How will you use your resources to carry out your strategy and work toward objectives?
- You can have several tactics per strategy.
- Some plans stop with tactics, omitting detail of activities.

6. Activities

- Include specific activities required under your tactics to carry out strategies.
- Informal plans often jump from objectives to activities.
- Vehicles or channels you will use to communicate can appear here.

7. Evaluation

- Are you reaching your objectives?
- Measurement? Observation? Opinion? Feedback?

8. Materials

- What do you need to implement/execute tactics?

9. Budget

- Include out-of-pocket costs, staff time, volunteer energy, transportation, images, materials, fabrication, etc.

10. Timetable and Task List

- Who does what when? Work backward from deadline or forward from start date.

Courtesy of Ferne G. Bonomi, APR, Fellow PRSA.

Budgeting: Additional Tips

Budgeting must be considered in all aspects of public relations planning, whether the practitioner works for a corporation, firm, nonprofit, government entity, or other organization. Without proper budget planning, even the best plans will fail if sufficient resources are not allocated. During planning stages, managers must determine what specific actions will be undertaken by which employees or outside consultants and how much each specific activity will cost. Of course, adjustments often are made during a campaign, but funding should be estimated as closely as possible based on all relevant factors.

According to Broom, budgeting in public relations is an art and a science. Many practitioners are not familiar enough with general budgeting procedures, and relatively few have a related background in business. Public relations managers tend to focus on writing and creativity, and often budgeting is left to other offices. However, to truly reach optimal success public relations leaders should strive to estimate and manage accurate budgets.

Four basic methods or control factors relate to public relations budgeting: overall income or money available for the organization and unit, the competitive necessity of the public relations function and related areas, the specific tasks or goals set for the organization and department, and the element of profit or excess funds after expenses. In the first model, the public relations unit is often allocated a percentage of the organization's total budget. In the competitive necessity focus, competitors are evaluated, and attempts are made to match or exceed their spending. In the goal or task model, specific amounts are set aside for certain activities deemed

important for public relations. The excess profit model, or fourth example, provides funding for public relations from excess funds or profit. This method is especially problematic since it implies that public relations is a function to be considered after everything else has been budgeted!

Budgeting is most often conducted by a team of practitioners and related administrators or staff, and normally feedback from various colleagues is necessary. Broom lists three important budgeting guidelines: know prices of items (whether products or services), communicate the overall budget related to costs leading to results, and use a spreadsheet and similar software to plan and manage the program (Broom, 2009, EPR, pp. 299, 318-320).

→ Exercise: Build Confidence in Your Knowledge, Skills and Abilities in Research

Find something in the news that involves an organization outside your own field—a small business, large corporation, government entity, or nonprofit. It can be a challenge, a problem, a solution, an event—whatever is making news.

1. **Put yourself** in the shoes of the public relations professional for that organization.
2. **List** half a dozen audiences you should consider from the perspective of this role.
3. **Select** two audiences who seem to be the most significant.
4. **Think** about what you in your public relations capacity for the organization might want from the two audiences. Think in terms of awareness, attitude or action. Consider verbs such as be aware of, favor, oppose, endorse, buy, discard or others that fit the situation.
5. **Consider** what information you need before you start to plan toward your desired results. Apply what you know about research.
6. **Think of three** research activities that will provide useful information for planning. Classify each of the methods you think of as formal or informal. Remember, formal uses scientific method. Informal is everything else.

For each activity, write down the following.

- o **Method:** Develop a statement for the method, such as informal interviews, focus groups (informal), formal telephone survey, informal content analysis, etc. (*Tip:* If you have trouble putting labels on your methods, go back to one of your text resources, review the appendix in this guide or visit online resources included in the links section of this guide. Can you identify research activities by name?)
- o **Source:** Where is your information coming from? Employees? Customers? Local newspapers?
- o **Rationale:** Write a one-sentence statement of why you are going to do this, what you want to determine. (*Tip:* A rationale is generally a good way to present research activities in a plan or report.)

Note: Other parts of the organization may have existing data or information gathered for other reasons that can be used in your planning. Seek out that information.

If possible, have your research plan reviewed by a colleague or colleagues. See if you agree on terminology and whether the activities will be fruitful. Or share it with a mentor or Accreditation coach.

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