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Executive Summary

The purpose of the executive summary is to provide a concise summary of a proposal/report so that decision-makers and managers can have an overview of the project without having to read a lengthy document. Executive summaries are written for individuals who do not have time to read lengthy reports. Executive summaries should be written with complete sentences and in paragraph form. However, some items, such as lists of key messages, can be placed in bulleted lists and then elaborated on.

- **Statement of Situation:** Identify problems/opportunities and briefly explain.
- **Goals:** Broad statements of the desired end-state or outcome. E.g., "to promote positive media coverage of our event"; to position ourselves as a leader in healthcare."
- **List of Key Publics:** Identify all relevant internal and external publics. Be specific, and briefly explain why each is relevant.
- **Behavioral Objectives:** The steps to achieve goals. The ultimate behavior sought from each priority public. Written as specific, quantifiable, behaviors: "to…(verb), (public) by…(date)": "to convince 500 employees to attend payroll workshops by November"; "to persuade the media to run three feature stories on our company by December"; "to get 5000 voters to request information from our Web site by March," etc.
- **Key Strategies:** The underlying activities that shape public relations objectives and influence their success. How we get publics to do what we want them to do. Strategies should be explicit and targeted to specific publics. Strategies include: To inform, create, shape, build, change, improve, move, convince, raise, etc.
- **Major Tactics:** The activities we undertake to fulfill strategies. The things we do. Tactics include: writing news releases, creating brochures, conducting meetings, designing Web sites, facilitating media coverage, sending invitations, creating media kits, writing or delivering speeches, meeting with journalist or local politicians, etc.
- **List of Key Messages:** Encapsulation of the messages used as part of written or spoken tactics. Key messages are repeated in, and reinforced by, all tactics: E.g., "We act on your concerns…"; "You are important to us…"; "We care about your family," etc.
- **Evaluation:** Evaluation of a campaign's success is based on whether its goals/objectives have been met and to what degree. Evaluation revolves around objectives/tactics. E.g., were the campaign's publics reached and did they respond as desired, etc.
- **Budget Projections:** Be as accurate as possible. Include the cost for the production, distribution, and overhead for all tactics. Summarize each activity in tabular form with real cost estimates.
- **Timeframe:** Clearly articulate when events begin/end, what activities overlap, and what events/activities/tactics are most critical—consider using a Gantt chart here.

Goals, Objectives, Strategies, and Tactics in Strategic Planning

Goals: Broad, general statements of the desired end-state or outcome. Programs and campaigns may have one big goal or several more modest goals. Goals are usually written as follows:

- "To promote positive media coverage of our event."
- "To provide customer service of the 'highest quality.'"
- "To create a safe workplace for our employees."
- "To position ourselves as a leader in healthcare."
- "To cut the accident rate among workers."
- "To raise our score on the five-point 'Customer Satisfaction' rating scale."

Objectives: Statements about how you will influence or change behaviors, knowledge, or attitudes of individuals and public. Objectives help achieve goals. Objectives should be specific to publics, measurable, and achievable by a specific date/timeframe. Measuring objectives requires pretest (benchmark) data and posttest data. Quantitative objectives are preferable to qualitative objectives.

Types of objectives include:

Behavioral Objectives try to modify how people act or behave. Behavioral objectives represent the *behaviors* that are necessary to make the goals happen. Often several behaviors are necessary to accomplish each goal.

Attitudinal Objectives try to modify how people feel or what people believe about something or someone. Changed beliefs lead to changed behaviors.

Knowledge Objectives try to modify what people know about something or someone. Increased knowledge about an issue will lead to changed beliefs and behaviors.

Behavioral objectives should be written as specific, quantifiable, behaviors with specific timeframes for achievement: "to (verb) X (public) to do Y (behavior) by Z (date)." E.g.:

- "To receive comments from 500 more customers by the end of the fiscal year."
- "To provide information (via our Web site) to 5,000 registered voters by March."
- "To convince 500 employees to attend a payroll workshop by November."
- "To persuade three media representatives to take a plant tour by March."
- "To review 250 applications from undergraduate students by November."

Objectives Example: If our goal is "*To create a safe workplace for our employees*," several behaviors will be needed to make this happen and it might include:

- **To encourage** all employees to regularly wear their safety equipment (goggles, earplugs, gloves, etc.) by December;
- **To convince** all employees to immediately report unsafe work conditions;
- **To require** all employees to attend a "safety seminar" each quarter.

Strategies: The informative/persuasive techniques used to encourage behaviors, achieve understanding, alter beliefs, and achieve objectives. Like objectives, strategies are targeted to specific publics. What works with one public will not necessarily work with another.

In practice, the strategies that we might use to get people to do what we want them to do are limitless and include: information, persuasion, entertainment, repetition, fear, identification, environmental changes, modeling, use of celebrities, face-to-face meetings, symbols/images, etc.

> **Strategies Example:** Using our goal of "*To create a safe workplace for our employees*," and one of our objectives, "*To convince all employees to immediately report unsafe work conditions,*" there are many strategies we could use to get employees to report unsafe conditions:
> - **Information:** Post safety signs saying, "Be safe! Report all unsafe conditions!" etc.
> - **Ego:** Employees who report unsafe conditions get merit badges, their pictures posted on a bulletin board, a shout-out in the employee newsletter, etc.
> - **Economic:** Reporting an unsafe condition earns employees 50 bucks!
> - **Images/Fear:** Post signs depicting accidents and encouraging employees to report unsafe conditions.
> - **Diffusion/Repetition:** Relate stories about unsafe conditions in newsletters and employee correspondence.

Tactics: The activities we undertake to fulfill the strategies. For every strategy you will utilize one or more tactics. Tactics include face-to-face interactions, public gatherings, group meetings, and written documents: news releases, brochures, speeches, invitations, media kits, etc. Sometimes the line between strategies and tactics is blurred. Holding a meeting to *inform* organizational members is a strategy, as is inviting a celebrity to speak at the event. The speeches given at the meeting, the materials that are distributed are tactics. But is a Web site a strategy or tactic?

> **Tactics Example:** Using our goal of "*To create a safe workplace for our employees*," and one of our objectives, "*To convince all employees to immediately report unsafe work conditions*," a strategy of "*offering an economic incentive (or reward) for reporting unsafe conditions,*" we need to make employees aware of the reward program so that they start looking for unsafe conditions. Tactics might include:
> - **Print:** Posters/signs around the plant about the new program; a story in the employee newsletter about the upcoming "incentive program"; creating a brochure explaining how the program works to be used in a "point-of-purchase display,"; including a copy of the reporting form in the employee's pay envelopes, etc.
> - **Spoken:** Mentioning the program at the next plant meeting and providing instructions for how to properly report an unsafe condition and claim the reward; mentioning the program during a news conference, interview, or other appropriate public event. Note: these both might be "strategies" as well.
> - **Electronic:** Writing a story about the new program for the employee Intranet.
> - **Media:** Writing a news release about the new program and submitting it to local newspapers; creating a fact sheet about the program for media or informational kits, etc.

Setting clear goals, objectives, strategies, and tactics is the first step toward effective planning and integral to the RACE process. Effective campaigns begin with effective research and strategic planning, and end with evaluation.

The Steps in a Management By Objective (MBO) Campaign[1]

NB: The steps in a campaign are not linear. For example, before you can develop possible "tactics," you need to know how much money (budget) you have to spend or how much time (timeframe) you have to accomplish your goals.

"Evaluative research" refers to research conducted at the end of a campaign to measure success, as opposed to "formative research," or research conducted at the beginning of a campaign (or during a campaign) to identify a public's level of knowledge etc.). Think of the RACE formula "**R**esearch, **A**ction, **C**ommunication, **E**valuation."

After many campaigns, "evaluative research" is not conducted simply because the client or organization cannot afford it, or did not budget for the research. For example, in a campaign aimed at influencing the vote on a public issue (like opposing a gun control effort by the gun lobby), the organization usually only cares whether the referendum was supported or defeated, not why.

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1. **Statement of Situation:** Identify problems/opportunities and briefly explain.

Typically campaigns/programs address problems that the organization has detected. Example: Group/organization X learns of legislation to regulate its business practices.

However, even disasters can lead to positive outcomes. Opportunities are often not as apparent as a problem but they must be recognized and pursued as part of campaigns. Example: "As part of its campaign to influence voters, group/organization X encourages its employees to become volunteers in their local communities, and a system for rewarding those who participate is established and publicized.

2. **Research:** Describe the formative research (the **R** in RACE formula) necessary to identify "key publics" and complete steps 4–11 below.

Research should be conducted before planning any communication campaign. Valuable information can be obtained through personal interviews, focus group interviews, surveys, the Internet/WWW, government and private databases, etc. Data can also be gathered from public or government records, reports, and research published in professional journals. When case studies and data from other successful campaigns or organizations are used as models for campaigns (such as the Tylenol case), the activity is called benchmarking.

When planning and designing formative research, one should remember that the most effective evaluative research (the **E** in the RACE formula) is based on baseline data gathered in the formative research. In other words, if you administer an opinion survey to your employees before a campaign, you need to use the same survey instrument after the campaign to determine whether the target public's attitude has changed as a result of the campaign. (This is where most campaigns fail. Many entries in the Public Relations Society of America's annual Silver Anvil awards competition offer surveys and focus groups as a formative research, and then evaluative research based on placement of news releases, etc.—"apples and oranges").

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[1] Based substantially on Todd Hunt's 1996 Rutgers Web page.

3. **List of Key Publics:** Identify and describe all relevant internal and external publics. Be specific, and explain why each is relevant.

Rarely is it useful to think of "the general public" or " the mass audience" when planning a public relations campaign. Key publics are those publics most likely to respond to the objectives you have set. "All citizens," therefore, is not a useful target group. Even when all citizens are affected by an outcome, not all citizens are registered voters. <u>For example</u>, in a School Board election, sometimes only 10 percent of the registered voters turn out. Of that 10 percent, the "key public" may be senior citizens who routinely oppose measures that affect property taxes—since many are on fixed-incomes, small changes in taxes can mean a lot. Given this scenario, then, as little as 5 percent of the "general public" may constitute a "key public," although all may be affected. Of course, most issues involve multiple key publics, each with specific concerns and in need of specific messages.

4. **Goals:** Broad/General statements of the desired end-state or outcome. E.g.,
    - "To promote positive media coverage of our event."
    - "To provide our customers service of the 'highest quality.'"
    - "To create a safe workplace for our employees."
    - "To position ourselves as a leader in healthcare."
    - "To cut the accident rate among workers."
    - "To raise our score on the five-point 'Customer Satisfaction' rating scale."

An organization should not expend resources on activities that do not relate in some way to the general mission of the organization or to one or more of its specific goals. Until specific goals are articulated, a campaign should not be undertaken. You should be able to answer the "why" question: "why did the organization devote resources to this campaign to influence its public(s)?"

5. **Behavioral Objectives:** The steps to achieve goals. Behavioral objectives are specific and measurable and contain time limits. They represent the ultimate <u>behavior</u> sought from each key public. Objectives are often goal specific. That is, each goal of a campaign will be accomplished by one or more objectives. Behavioral objectives should be written as specific, quantifiable, behaviors: "to (verb) X (public) to do Y (behavior) by (date)." E.g.,
    - "To convince 500 employees to attend a payroll workshops by November."
    - "To persuade three local media representatives to take a plant tour by March."
    - "To convince 5,000 registered voters to request information from our Web site by March."

6. **Key Strategies:** The underlying logic guiding objectives and promoting their success. How we get publics to do what we want them to do. Strategies should be explicit and targeted to <u>specific publics</u>.

Strategies are targeted to specific publics and should be based on communication and persuasion theories. For example, in order to "convince 100 kids to visit our community center by March" (behavioral objective) you might target their parents, siblings, grandparents, and friends with information about the center. The rationale being that what kids often do is influenced by respected family members, siblings, and friends (community power theory).

7. **Major Tactics:** The activities we undertake to fulfill strategies. The things we do. For every strategy you will utilize one or more tactics. Tactics include: writing news releases, creating brochures, conducting meetings, designing Web sites, facilitating media coverage, sending invitations, creating media kits, writing or delivering speeches, meeting with journalist or local politicians, etc.

For example: if your "strategy" is to inform parents (in order for them to influence their kids), you will need to reach the parents with your message. Effective tactics might include

- Arranging to have an organizational spokesperson interviewed on a local, regional, or national radio or television talk show—Opera, CNN, The Alan King Show, Talk of the Nation, etc.
- Sending out direct mailers about the event in question.
- Speaking about the event at a local school board meeting, etc.

8. **List of Key Messages:** Describe the message elements selected for the campaign. Messages are used as part of written and spoken tactics. Key messages are repeated in, and reinforced by, all tactics: E.g., "We act on your concerns…"; "You are important to us…"; "We care about your family," etc. Messages often vary slightly with different publics—healthcare providers as opposed to potential customers.

Limit yourself to only a few key messages and one overall theme.

Start by defining the "bumper-sticker-sized" message that the organization wants to get across in its communication campaign: "Support the school bond amendment . . . our children's futures depend on it"; or, "Men over 50 should have a prostate diagnosis annually."

9. **Channels:** Identify the key channels useful for reaching each designated public.

Some channels are very expensive: television advertising, mass mailings, videotapes. Some channels are relatively inexpensive: news releases, public service announcements, speeches to civic groups given by trained volunteers.

Your formative research should reveal what sort of channel options exist for your messages. Some channels are more persuasive than others. For example, an appearance before an affluent audience by a well-informed and highly articulate spokesperson for a charity is more likely to result in more generous donations than a direct mail appeal to "Mr. Smith . . ." but will not probably not reach as many potential contributors.

Some channels are becoming essential in all circumstances. An Intranet used by employees, for example, would logically be part of your mix when employees are a key public. In other situations, personal meetings with corporate/political "biggies" might be expected. Similarly, the Web is useful in many circumstances.

10. **Timeframe:** Clearly articulate when events begin/end, what activities overlap, and what events/activities/tactics are most critical—consider using a Gantt chart or a calendar.

Sometimes the length of a campaign is dictated by a culminating event: the annual meeting of a corporation, an election, or an ultimatum set by a protest group. It is usually not a good idea to start a campaign without going through the steps outlined above.

Since timeframes for campaigns are often out of your hands, they may be shorter than an organization would wish (such as is the case with a crisis). On the other hand, sometimes the time frame can be set by the organization. A membership campaign for example. Because campaigns often exhaust those responsible for running them, and sometimes "wear out the welcome" with publics to which they are addressed, timeframes should be modest.

For example: An anniversary campaign for an institution may run throughout an entire year, tied in with a year-end celebration. However, a blood donation campaign rarely is effective if it hangs around for more than a month.

Always remember when planning events to check the local/state/national media calendar so that your message is not lost in the background: the Starr report, the 9/11 fallout, the Olympics, etc.

11. Budget Projections: Be as accurate as possible. Include the cost for the production and distribution for all tactics. Summarize each activity in tabular form with real cost estimates.

Although budgets are reported in tabular form, they will always be accompanied by a budget narrative in which you relate which activities are the most important/essential, and why. Note: "most important" does not always mean "most expensive" but it sometimes does. When engaging in bottom-up budgeting you must be able to create arguments for what items are the most important to the success of the campaign.

12. Evaluation: Describe the evaluative research proposed for the end of the campaign. Evaluation of a campaign's success is based on whether its goals/objectives have been met and to what degree.

As noted above, the most effective evaluative research (the **E** in the RACE formula) often replicates methods used in the formative research. The evaluation is also the place to summarize what was learned from this campaign that might inform the organization for future campaigns.

••EXAMPLE••

Situation: A new university graduate program needs to increase attendance to avoid being cancelled.

Research: Who are the potential students?; what attracted the current students?; etc.

Key Publics: Local professionals; the media who write about education issues; current undergraduates.

Goals: To increase enrollment in the program; to increase the prestige of the department; etc.

Behavioral Objectives: "To convince 10 undergraduates to pursue graduate education in the program by next fall"; etc.

Strategies: Appeal to the students' greed by informing them that students with graduate educations earn more over their lifetimes (Maslow); inform the students about other undergraduates who went on for graduate degrees and now have good jobs (social learning theory).

Tactics: Create a new Web site for students talking about graduate education; create posters to put around the department talking about graduate opportunities; etc.

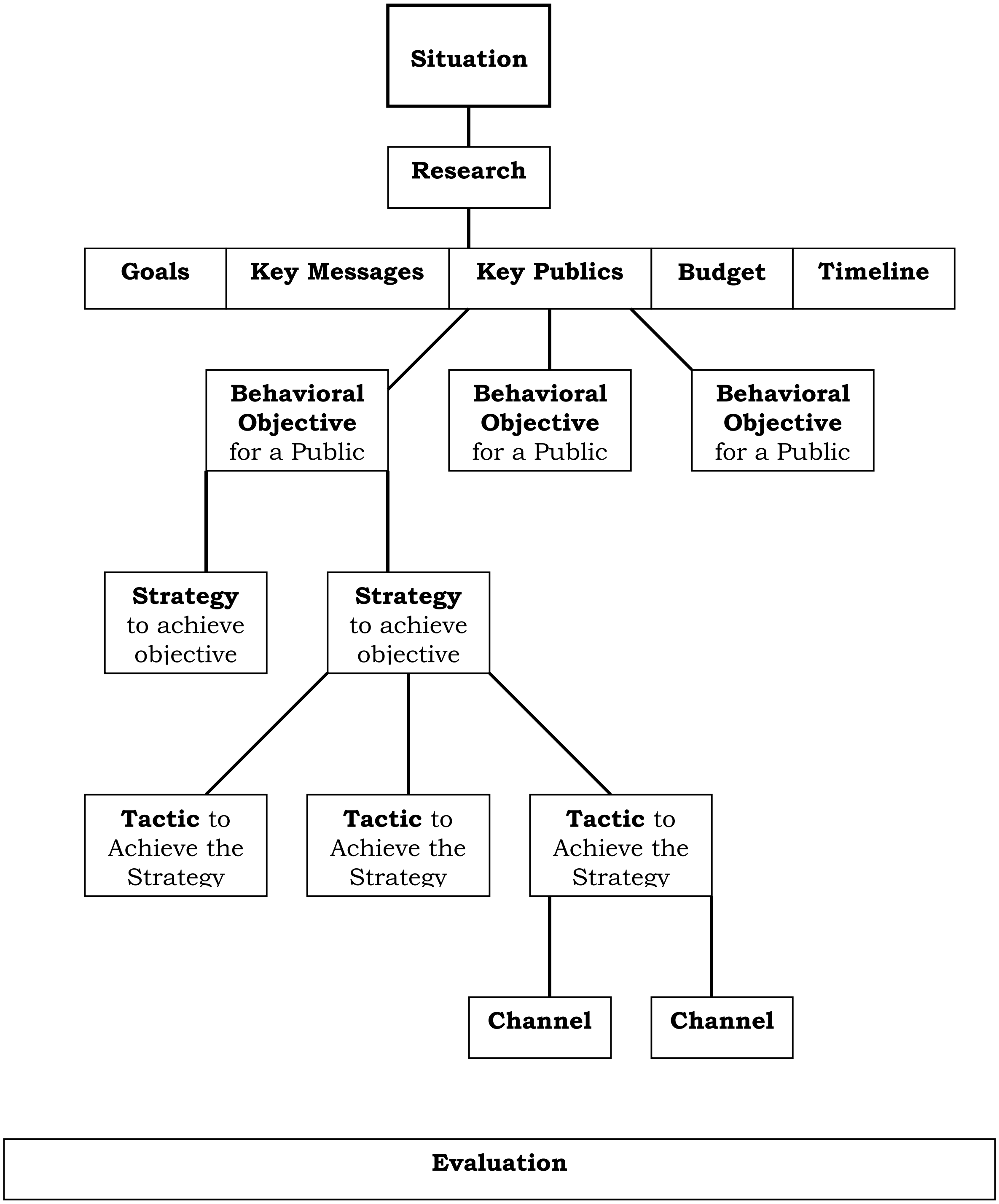
Messages: "Times are hard . . . stay in school"; "Graduate education makes you more employable"; etc.

Channels: Web site (electronic); written messages (posters); print (direct mailing); interpersonal contact.

Timeframe: 6–12 months. Web site and posters during third month; interpersonal contact during sixth month; direct mailing before application deadline; etc.

Budget: Printed materials: 10 posters—$1,000; brochures—$300; Web site redesign—$1,000; etc.

Evaluation: Assess how many undergraduates apply; evaluate level of awareness of program; etc.


Situation
Research
Goals
Key Messages
Key Publics
Budget
Timeline
Behavioral Objective for a Public
Behavioral Objective for a Public
Behavioral Objective for a Public
Strategy to achieve objective
Strategy to achieve objective
Tactic to Achieve the Strategy
Tactic to Achieve the Strategy
Tactic to Achieve the Strategy
Channel
Channel
Evaluation

Program and Campaign Proposals: Management By Objective (MBO)

Campaign proposals are often organized using a Management by Objective (MBO) framework and might be 15–50 pages long depending upon the complexity of the campaign. MBO is essentially an expanded version of the RACE formula (Research, Analysis, Communication, and Evaluation) used to describe the process of any public relations campaign, beginning with research and ending with research (evaluation).

All public relations campaigns ultimately begin with environmental scanning and formative research. Before a campaign can be developed, public relations professionals need to know the basics about what has come before, what publics/individuals will be involved or targeted, etc. Campaigns begin with "formative research." "Evaluative research" refers to research conducted at the end of a campaign to measure success as well as research conducted throughout a program or campaign to gauge the overall effectiveness of parts or stages of a campaign. Sadly, many clients and organizations are unwilling to fund evaluative research at the end of a campaign and many practitioners do not budget for evaluative research not appreciating its value.

Although the steps in MBO seem very linear, they are not. Before you can develop possible "tactics," you need to know how much money (budget) you have to spend and how much time you have to accomplish your goals. Similarly, before you accurately develop a budget or timeline for a campaign you have to have some idea of what tactics will be employed. In practice campaign development is organic. In some cases practitioners will have the ability to propose their own budgets (bottom-up budgeting) while in other cases, budgets are provided by upper managers (top-down budgeting). See Figure 10.2 for a graphic representation of the MBO process. When preparing a program or campaign proposal, the MBO steps include:

(1) Statement of the Situation (Includes both problems and opportunities).
(2) Research (Environmental scanning, formative, evaluative, post campaign).
(3) Key Publics (Individuals/groups targeted by the campaign).
(4) Goals (broad statements of the desired end state).
(5) Behavioral Objectives (Behaviors sought from individuals/publics) (cf., Tucker, Derelian, and Rouner, 1999, passim).
(6) Strategies (Informative/persuasive techniques used to accomplish objectives).
(7) Tactics (Specific public relations activities and documents used to achieve strategies).
(8) Key Campaign Messages (Slogans, phrases, ideas—messages vary slightly from public to public).
(9) Specific Channels and Media to be Used (Print/broadcast advertising, interpersonal influence, written messages, electronic messages, etc.).
(10) Timeframe for Campaign Activities (Over what period of time will the campaign/program run? When will specific tactics need to be ready? What are the milestone, i.e., "by X date we expect . . ." etc.).
(11) Budget Projections (How much money will it cost to achieve the proposed goals and execute the desired tactics? Often you will include budgeting scenarios here as well: "What if not funded? [WINF], Shadow benefit pricing, etc.) (McElreath, 1997, pp. 290–305).
(12) Evaluation of the Campaign (Efforts are made to determine what strategies/tactics were the most useful for achieving the desired goals. Ideally, evaluative strategies have been built into the campaign so that *what* is being measured is fairly straightforward. Note, counting the number of successfully placed news releases at the end of the campaign is not what I mean here. That sort of evaluation is simply done to CYA and justify your position to management, not to determine what was the most useful part of a campaign for the future).

The first step in the MBO process, as in any decision making process, is to effectively define the situation's problems and opportunities.

Statement of Situation: Identify the problems/opportunities that the organization is dealing with and briefly explain them. Typically, campaigns/programs address *problems* that the organization has detected. *For example*: an organization learns of legislation to regulate its business practices and decides to try and manage the issue to achieve a positive outcome. All situations are characterized by problems and opportunities. Opportunities are often not as apparent as problems but they must be recognized and taken advantage of as part of a campaign or program. For example, as part of its issue management campaign, an organization encourages its employees to volunteer in their local communities and establishes a system for rewarding employees who participate. Such an opportunity might serve as an ongoing source of positive public relations and would likely far outweigh its cost of implementation in terms of media coverage and goodwill.

The MBO process is organic in the sense that every campaign is different and how a professional begins to prepare for a campaign varies on a case-by-case basis. Often the statement of situation precedes other campaign planning activities such as gathering research, identifying key publics, etc. However, just as often, especially with issue management, research must be conducted *before* a situation can be defined.

Research: In an MBO proposal, research describes the findings from the formative research (the **R** in the RACE formula) and any relevant environmental scanning and how it informs the proposed campaign. Often times, your research *follows* something else such as identification of key publics. However, other times, publics can only be identified *after* research is conducted. Whatever the case, proper formative research must precede campaign planning.

Valuable formative research can be obtained through personal interviews, focus group interviews, surveys, Internet news groups, Blogs and news sites, government and private databases, focused searches using tools like Google Scholar (Kent, 2005c), etc. Data can also be gathered from public or government records, reports, and research published in professional journals. When case studies and data from other successful campaigns or organizations are used as models for campaigns (such as the famous Tylenol case), the activity is called benchmarking.

When planning and conducting formative research, be aware that the most effective evaluative research (the E in the RACE formula) is based on baseline data gathered in the formative research. In other words, if you administer an opinion survey to employees *before* a campaign, you should use the same survey instrument *after* the campaign to determine how much change has occurred and whether goals were achieved. Failure to do research at the end of a campaign is where most professionals miss out on opportunities to learn even more from their success and mistakes. Many entries in the Public Relations Society of America's annual Silver Anvil competition claim to have conducted surveys and focus groups as formative research strategies, and then fail to evaluative the publics at the end of the campaign instead focusing on placement of news releases, etc. Counting news releases is no substitute for proper evaluative research.

List of Key Publics: Identify and describe all relevant internal and external publics. Be specific and explain why each is relevant. Rarely (with the possible exception of political public relations or issue management) is "the general public" or "the citizens of . . ." relevant when planning campaigns/programs. Key publics are those publics whose behaviors you hope to alter as a result of a campaign/program. "All citizens," therefore, is not a useful target group. Even when all citizens are affected by the outcome, not all citizens are registered voters, not all citizens can be persuaded (republicans, democrats, partisans, etc.), not all citizens care, not all citizens can be reached. And, more importantly, why put in the time and money to reach "all citizens" if the only people who matter to your success are "women ages 18–25," or "unregistered voters in the 5th district?"

For example, in a School Board election, during an off election cycle, sometimes no more than 15% of the registered voters turn out. Of that number, the "key public" may be senior citizens who routinely oppose measures that affect property taxes (since many are on fixed-incomes, small changes in taxes can mean a lot). Given this scenario, then, a targeted group of senior citizens (as little as 5% of the "general public") may constitute a "key public" capable of achieving organizational success. Of course, most issues involve multiple key publics, each with specific concerns and in need of specific messages but the principle holds: there is no "general public."

Goals: Broad, general statements of the desired end-state or outcome. Goals are usually written as infinitive statements:

- "To promote positive media coverage of our event."
- "To provide customer service of the 'highest quality.'"
- "To create a safe workplace for our employees."
- "To position ourselves as a leader in healthcare."
- "To cut the accident rate among workers."
- "To raise our score on the five-point 'Customer Satisfaction' rating scale."

In general, goals should be consistent (or not inconsistent) with the general mission of the organization. Until specific goals are articulated, a campaign should not be undertaken. You must be able to answer the "why" question: "why should we devote resources to this campaign?" before you take any action.

Once goals have been established, the next step is to make your goals a reality. Goals are enacted by influencing, or shaping, the behaviors of key publics. Ultimately, your goals must involve getting individuals and publics to act (or behave) in a certain fashion, rather than changing their opinions. Changed opinions, beliefs, or values that do not result in changed *actions* (behaviors) are essentially worthless as far as a campaign is concerned. With the exception of activist and nonprofit group that might see long-term value in changing individual beliefs, values, and attitudes, most organizations quantify success by seeking tangible, measurable change in the behaviors (and beliefs) of publics. In order to get individuals and publics to take actions that will result in the campaign achieving its goals, behavioral objectives are developed for each key public.

Behavioral Objectives: Influencing or changing the behaviors of each public are what lead to achieving the goals set. Behavioral objectives are specific to particular publics, measurable, and meet specific time constraints. Behavioral objectives represent the ultimate *behaviors* sought from individuals/publics. Behavioral objectives are often goal specific, meaning that one behavior will not fulfill a campaign/program's goals. Each goal often requires multiple behaviors. Behavioral objectives should be written as specific, quantifiable, behaviors with specific timeframes for achievement: "to (verb) X (public) to do Y (behavior) by Z (date)." E.g.,

- "To receive comments from 500 more customers by the end of the fiscal year."
- "To provide information (via our Web site) to 5,000 registered voters by March."
- "To convince 500 employees to attend a payroll workshops by November."
- "To persuade three media representatives to take a plant tour by March."
- "To review 250 applications from undergraduate students by November."

Key Strategies: The informative/persuasive techniques used to accomplish objectives. How we get publics to do what we want them to do. Strategies are also targeted to specific publics. What works with one public will not necessarily work with another. For example, an organization may hire a celebrity spokesperson to attract attention to a cause but if the spokesperson is controversial (Hilary Clinton, Rush Limbaugh, a "gay" boy scout), or openly partisan (Jane Fonda, Charlton Heston), s/he might actually serve to discourage some people from attending the event. Similarly, an appearance by 50 Cent is not going to bring out the over 50 crowd, and an appearance by neal diamond at an event will not attract most youths. Strategies are simply not useful for all public or in all places.

Perhaps the easiest way to think about a strategy is to think about what happens when a child asks her mother if she can go to a movie: "Mom, can I go see Rocky 15 with my friends?" "Go ask your Dad" Mom replies. At this point, every kid knows that she has the possibility of using any of several strategies to get her way. Each strategies effectiveness and likelihood of use depends upon the nature of the relationship and the public (Dad vs. Mom). One strategy is simply to ask Dad if you can go (you do this if you believe that Dad will say yes, or if you know that your parents may communicate with each other about the decision. Another strategy is to tell your father that "Mom said it was okay for me to go to Rocky 15 with my friends if you said I could." Not entirely true but not quite a lie. Another strategy is to confront your father as if he were actually the first person you are asking: "Dad, you don't mind if I go to the movies with my friends do you?" Assuming Dad passes the buck as you expected him to do: "Go ask your mother," you can go back to your mother claiming, "Dad said I could go as long as you say yes." Now, Mom, thinking that Dad said it was okay, will likely accede, allowing you to go back to dad and tell him "Mom said it was okay." If mom or dad actually said no, you still have other strategies: whining, pestering, promising to do some work around the house for the chance to go, using guilt: "You let Susan go last week!" etc.

As you can see, all of these are "strategies" to accomplish your goal(s) and behavioral objectives. The tactics, described next, in this case are interpersonal influence. Sometimes, strategies involve persuasive efforts; other times, strategies involve informing a public about something.

To put this into a public relations context, imagine you were working with an inner-city youth organization "To convince 100 kids to visit your community center by March" (behavioral objective). An obvious strategy might be to "inform" the kids about the center by "visiting" schools, churches, etc., or even by canvassing their neighborhoods with local community leaders. Related strategies include informing the students by sending them e-mail messages (if this were a more upscale audience with wide-spread technology access), persuading them to come by speaking at a rally at their local high school, or bypassing the kids entirely and sending information to their parents (Community Power Theory).

Just as behavioral objectives are sought to achieve goals, and strategies are used to influence behaviors, tactics are used to support strategies. To obtain specific behaviors from individuals and publics may require several strategies: informative, persuasive, personal influence, etc. Several tactics in turn support each strategy. If a strategy is to "inform" a public about an upcoming event that you want them to attend, several tactics might be necessary to make individuals and publics aware of the event, and knowledgeable about where the event will taking place, etc. Potential tactics include: news releases, transit signs, having an organizational member visit a daytime radio talk show, direct mailings, etc.

Tactics: The activities we undertake to fulfill the strategies. The things we do. For every strategy you will utilize one or more tactics. Sometimes tactics are very straightforward and are clearly tools to achieve our objectives: writing news releases, brochures, speeches, invitations, and creating media kits. However, at other times, the line between strategies and tactics is blurred: holding meetings, designing a Web site, and facilitating media coverage, might all be strategies in some campaign/programs and in other situations might be tactics. Activities like meetings with journalist or local politicians, also have the quality of being strategies (to influence) as well as tactics (to inform).

For example, in the situation about the community center, above, if your "strategy" is to inform parents (in order for them to influence their kids—community power theory), you will need to *reach* the parents with your message. Thus, effective tactics might include

- Having an organizational spokesperson give a brief speech at a local church.
- Arranging for some media coverage such as an interview on a local, regional, or national radio or television talk show.
- Sending out a mailer or informational packet about the center.
- Creating billboards/signs for the school, busses, parks, etc.
- Writing a letter to the editor about the center.

No matter what the tactics are, all communication must be guided by harmonious, appropriate, and compelling messages.

Key Messages: Key messages are the "sound bites" or slogans that are used in campaigns/programs. An abundance of persuasion research tells us that catchy slogans, acronyms, jingles, etc. can help individuals remember things. Thus, campaigns/programs require several consistent, key, messages. Be aware, however, that key messages vary slightly with each public. Although campaigns require consistent messages/slogans for advertisements, signage, documents, goals and objectives, messages vary, as do publics. Messages are used as part of all written and spoken tactics.

Going back to our community center example, one branch (or goal) of the campaign might focus on raising awareness about the center in the minds of kids, parents, and community members. However, another branch (or goal) of the campaign might involve trying to get parents involved in the center. "Do it for the kids" might be how messages to adults are framed but obviously such a key message must be changed for the kids themselves. Thus, a campaign will often draw upon several key messages that vary by public, each intended to achieve similar goals.

Limit yourself to only a few key messages and one overall theme. Start by creating themes ("CK: Campaign for Kids") and then developing the "bumper-sticker-sized" messages that the organization wants to get across to each public in its communication campaign/program: "'cause kids should have a place to go after school" (advertisements, letterhead, the media); "Help lead our future leaders" (parents, community leaders, teens); "For 20 bucks you could keep two kids off of crack" (fund raising, politicians, the media).

Channels: Decisions about channels are made because of the budget constraints, logistics, the audience targeted, the time frame available, etc. Obviously all channels are hypothetically available. However, when a budget is small, controlled media such as advertising are typically not options. Similarly, if your audience (such as in the example above of inner city youths) does not have access to the Internet, then electronic channels might also be out. In the case of an organization with very little funds, more emphasis will need to be placed on interpersonal and uncontrolled channels (news releases, letters to the editor, speeches, etc.); whereas, in the case of an organization with "deep pockets" budgets in the hundreds of thousands are common for a long-term, information campaign. Heavy use of the broadcast and print media would probably be a staple of any informative/persuasive effort for large organizations.

Identify the best channels for reaching each public. Do not assume that one channel will work in all situations. Some channels are *very* expensive (like television) and not particularly useful for reaching certain audiences (like kids) unless a very high budget is available. Other channels, such as printed materials, letters, mailings, DVDs, etc. can be more effective. Many channels are relatively inexpensive (almost free): news releases, public service announcements, speeches to civic groups given by volunteers, etc.

Your formative research should reveal what sort of channel options exist for your messages. If you think back to the persuasion chapter you will remember that some channels are more persuasive than others. For example, an appearance before an affluent audience by a well-informed and highly articulate spokesperson for a charity is more likely to result in generous donations than a direct mail appeal to “Mr. Smith . . .” Some channels are becoming essential in nearly all circumstances. For example employee Intranets, organizational Web sites, Internet news groups, Blogs, etc. In other situations, personal meetings with corporate/political “biggies” might be *expected*.

Besides being informed by goals, objectives, strategies, and tactics, campaigns are also guided and constrained by time and money constraints. How much time you have to achieve your goal and how much money you have to spend achieving it are usually more important than what you might like to achieve in a perfect world.

Timeframe: When preparing a campaign proposal you should clearly articulate when critical events/activities will take place and what the overall calendar of events will look like. A Gantt chart is useful for providing a graphic overview of a campaign/program (see Figure 10.3).

Sometimes the length of a campaign is dictated by a culminating event: the annual meeting of a corporation, an election, or an ultimatum set by a protest group. Other times, the culminating (or pseudo) event *is* what the whole campaign is leading up to (a “grand opening” etc.). Campaign timing also has to be planned, adjusted, or altered because of national, state and local events (Columbine happens so the NRA decides it *should* delay its annual meeting—they did not), holidays (many countries have twice as many holidays as we do in the U.S. so events have to be planned carefully), unforeseen events (a scandal, death, accident, etc.), or you lose the news cycle because of some other, unforeseen, groundbreaking event (scientists discover life on Mars, President G.W. Bush is found to have a chimp brain, etc.).

Since timeframes for campaigns are often out of your hands, they may be shorter than an organization would wish (such as is the case with a crisis). On the other hand, sometimes the time frame can be set by the organization. A membership campaign for example. Because campaigns often exhaust those responsible for running them, and sometimes “wear out their welcome” with publics, timeframes should be modest. *For example*: an anniversary campaign for an organization *might* effectively run throughout an entire year, tied in with a year-end celebration (in practice this is too long). However, a blood donation campaign rarely is any more effective if it hangs around for more than a week.

Always remember when planning events to check the local/state/national media calendar so that your message is not lost in the background: The World Series, the Super Bowl, an important media-trial verdict (Michael Jackson Finally Convicted), NASA launches a satellite with puppies and kittens for the space station, graduation week, etc. Like timing issues, budget constraints are crucial.

Budget: Practitioners who do not concern themselves with how resources are used in public relations campaigns are not managers and will rarely rise very far in an organization. Similarly, technicians who want to advance to middle and senior management positions must learn how to budget. To become an effective management tool a budget must be compared to other budgets and linked to significant and coherent organizational goals and objectives.

Be as accurate as possible when budgeting. Include estimates for the production and distribution for all tactics, summarize activities in tabular form with real cost estimates, etc. Although budgets are typically reported in tabular form, they are also accompanied by a budget narrative in which you relate which activities are the most important/essential, and why. Note: “most important” does not always mean “most expensive” but it sometimes does.

A typical public relations budget includes: Salaries and benefits, in-house production costs and equipment, contracts to vendors, media costs, travel, special projects’ costs, contingencies, overhead, and profit.

Budgeting Strategies: The most common type of budget is the “Simple Narrative Budget” where each line item contains a brief explanation of how the money will be spent (see Table 10.1).

Steps for preparing a simple narrative budget

- Prepare a list of budget items. Expenditures can be broken down by activity, dates, department, campaign, client, activities on a Gantt chart, etc.
- For each item include two types of costs: *administrative* (for staff and in-house personnel) and *program costs* (out of pocket expenses—equipment, vendors, consulting, production, etc.)
- Estimate income generated by each budget item (where appropriate). For example, a fund-raising dinner can be expected to generate revenue, as could a luncheon.
- Discuss preliminary budgets with staff to ensure that nothing in forgotten and agreement regarding activities is reached.
- Check and double-check calculations by row and column.

Often, when preparing a proposal for an organization or client the budget (typically a simple narrative budget) is accompanied by a lengthy narrative section explaining how monies are to be used and what activities are expected to result in the most benefit.

Detailed narrative budgets are often used to persuade managers to provide a certain level of funding for a campaign/program that might not succeed with too little funding. Detailed narrative budgets point out the relative importance of specific tactics, or the potential value to all members of a target audience. Often arguments are made by comparison (or analogy) of a product or service that *is* available in the market place to one the individual or public will receive through of the public relations campaign or program (as with shadow benefit pricing).

For example, arguments can be made by calculating the value of "free publicity" provided on signage when sponsoring an event, or Little League team, in relation to the cost of actually purchasing the same advertising space in some traditional media outlet. When engaging in bottom-up budgeting you must be able to create arguments for what items are the most important to the success of the campaign.

Evaluation: Describe the evaluative research proposed for the end of the campaign. Evaluation of a campaign's success is based on whether its goals/objectives have been met and to what degree, as well as efforts designed to ascertain why the campaign was successful or failed: i.e., what element of the campaign lead to its success. Organizations are often trying to do this when they ask you "where did you learn about us?" on application, and other documents. As noted above, the most effective evaluative research (the E in the RACE formula) replicates methods used in the formative research.