The planning and programming process

Planning is how we get from here to there. "Here" is where we are now. It is our current situation as we have described it after the research effort and redefinition of the problem. "There" is where we need to be, or the resolution of the problem. Planning helps us look ahead, to chart our course to the resolution to make sure we get there. Like sailing a boat, planning must be flexible and open to alteration and correction as we receive feedback or obtain new information. Nevertheless, unless we know where we are going and have some idea of an appropriate course to get there, our arrival at the resolution will be left to chance. The more complete our planning of the best course (based on good research), the better our chances of arriving at resolution.

The matrix approach to planning

The heart of the strategic program planning matrix is the planning section of the four-step public relations process (see figure 4.1). We addressed the organization of research (and its associated tools) in the previous chapter. The research process, the subsequent analysis of data, the redefinition of the situation and the problem (central core of difficulty), and preliminary identification of publics and resources lay the foundation for the planning process. Cutlip, Center and Broom (1994) call this a "searching look backward," a "wide look around," a "deep look inside," and a "long look ahead."

The next three parts of the process — planning, communication and evaluation — are separate and distinct in practice, although with admitted overlap and readjustment to the system in process. The strategic program planning matrix addresses them as discrete functions. Nevertheless, this is a *planning* matrix; the emphasis is on planning each step in the process *before* beginning the campaign. Thus, the resulting plan, although dynamic, becomes a document to drive both the communication and evaluation steps in the public relations process throughout the campaign.

Research helps us define the problem and the current environment within which the problem has occurred or will occur. Matrix planning identifies what specifically needs to be accomplished to solve the problem (*goal and objectives*),

PLANNING
The process of using research to chart the step-by-step course to solve the problem.

WILSON, Laurie. Strategic program: planning for effective public relations campaigns, 3th edition. Dubuque: Kendall/Hunt, 2000.

who we need to reach and/or motivate (*key publics*) to accomplish the goals and objectives and thereby solve the problem, what we need to convey to those publics (*messages*) to get them to act to help us achieve our objectives, and the best way to get those messages to those publics (*strategies and tactics*).

The process is analytical, with the decisions made and actions planned in each step driving the decisions

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Figure 4.1

The planning, communication and evaluation sections of the strategic program planning matrix

Planning

5. **Campaign goal(s)** — The end to be achieved to resolve the central core of difficulty.

6. **Objectives** — Specific, measurable, attainable, and time-bound results which will facilitate achievement of the campaign goal(s).

7. **Key publics** — Those audiences necessary to achieve the campaign goal(s) and objectives. Identifies self-interests to aid in the development of messages that will motivate them. Assesses current relationship with each public and identifies its strategic cooperative community to assist in identifying influentials.

8. **Message design** — Identifies the primary and secondary messages for each key public, taking care to incorporate each public's self-interest.

9. **Strategies** — Identifies specific strategies for each public designed to reach that public with its specially-designed messages.

10. **Tactics** — Specifies tactics or media tools to support each strategy for each specific public. Each strategy will need to be supported with a number of tactics designed to be channels for the message to be conveyed to that public through that strategy.

11. **Calendar** — Develop a time-task matrix such as a Gantt chart to integrate implementation of the strategic plan. The calendar should be organized by public and strategy, scheduling each tactic.

12. **Budget** — Organized by public and strategy, the budget should project the cost of each tactic in very specific terms. It should also indicate where cost will be offset by donation or sponsorship.

Communication

13. **Communication confirmation** — The communication confirmation table converts the plan devised for each public into short words in tabular form. The strategies and tactics for each public are reviewed to ensure they are appropriate to send the messages. The message should be confirmed against the public's self-interests. The table provides verification of the analytical process to make sure the plan will reach the publics with the message that will motivate them to action such that the campaign goal(s) is accomplished.

Key Public	Self-interests	Influentials	Strategy	Tactics/Tools	Message
1.					
2.					
3.					

Evaluation

14. **Evaluation criteria** — Identifies specific criteria based on the campaign goals and objectives.

15. **Evaluation tools** — Specific evaluation tools appropriate to measure each of the evaluation criteria, including them in the calendar and budget.

made and actions planned in each subsequent step. Further, the steps must be taken each in turn. The key publics for a particular problem-solving campaign cannot be selected until we have determined the goal and the objectives necessary to obtain that goal. Only then can we select the publics that are key to accomplishing our objectives.

Effective informational and motivational messages cannot be designed for a given public without a thorough analysis of its research profile, examination of the status of the current relationship with that public, and knowledge of its self-interests as they pertain to the problem at hand and related issues. Strategies and tactics appropriate to send the designed messages to the selected publics cannot be determined until we know what those messages are. Quite simply, the matrix approach requires we decide what we want to do, who we need to reach to do that, what messages we need to send to obtain their cooperation, and how we can most effectively send those messages. The steps must be taken in order or our planning is left to chance; it will most likely be flawed and off-track.

We have all seen campaigns that had good research but somehow misconnected in the planning process. One poignant example is Salt Lake City's campaign to win the bid for the 1998 (and subsequently the 2002) Winter Olympic Games. Because of the experience of the Denver organizing committee which had to withdraw its candidacy as the United States' represen-tative in a previous Olympic games bid because of opposing public opinion, the Salt Lake City organizers decided it was important to have a public referendum on the issue to demonstrate to the International Olympic Committee (IOC) that the Utah public supported Salt Lake's candidacy. With support running high in the state (upwards of 80 percent favorable opinion), the organizing committee expected a strong message from the public in support of the effort. Nevertheless, their own polling showed they had weak support and even opposition among senior citizens and very conservative elements of the public. Their worry was that in an off-year election, those are the very segments of the population that are most likely to vote. Given that information, their goal and objectives were to get out the supportive vote.

Their strategy was to air very clever, creative and visually appealing television spots (tactics) which gave people a good feeling about the Olympic games in Utah. At the end of the spots they showed a box with a check mark in it to indicate a vote supportive of the Olympic bid. But the ads were essentially still seeking public approval of the games because they never asked people *to get out of their chairs and go vote.* The bid already had a high public approval rating. What the committee really needed was to motivate those who approved to get to the polls and vote. But the committee (through its ads) never asked the approving public to actually go vote. So they didn't. The referendum

CAMPAIGN GOAL
The result or desired
outcome which solves
the problem.

passed by a very slim majority, and the committee was plagued with explaining the low margin of support to the IOC in every subsequent presentation.

Now that the city has won the opportunity to host the 2002 Winter Olympic Games, they no longer have to address the issue of citizen support to the IOC. Nevertheless, the low voter support of the referendum is continual fodder for the still active (albeit minority) opposition to the Games in Utah. No public opinion poll can ever entirely dispel the results of that actual vote.

The Salt Lake City Olympic organizing committee had good research data and analysis. They knew what they had to do (get out the supportive publics who don't typically vote in an off-year election). They knew specifically the profiles of the publics they had to reach. Yet they designed a message that did not ask those publics to do what the committee needed done, and they sent it in a broadly-targeted tactic through a mass medium ill-suited to the purpose at hand. Each step of the matrix planning process must build on the previous step. The logic must flow consistently and coherently. Disregarding the information accumulated, the decisions made and actions planned in one step will almost ensure that the decisions made and actions planned in the next step are off-target and headed for failure.

With this important lesson in mind, we now address each remaining step of the strategic program planning matrix.

Setting the campaign goal

Using the strategic program planning matrix, setting the goal appears to be a simple matter if the central core of difficulty is accurately determined. And the matrix certainly simplifies the process. The goal is actually a statement reversing the central core of difficulty. If your central core of difficulty is complacency among publics leading to a decline in blood donations, your goal is to reverse the complacency and increase blood donations. If your problem is a lack of accurate information regarding the process of organ donation causing a shortage of available organs for transplant, your goal is to convey appropriate information in such a way as to increase the number of organs donated.

Nevertheless, setting the goal may not be as simple as it appears. Too often, public relations practitioners act unilaterally to set goals to solve problems. But public relations is not an isolated function of an organization; it should be an integral part of the management function and team. Setting goals in isolation, or without consideration of the organization's overall goals is dangerous and can lead to lack of support at critical junctures.

Two precautions can aid the practitioner in avoiding this problem. First, if the daily public relations function has been approached strategically, or planned in accordance with the organization's mission and goals (including the goals of various other departments such as marketing), then the public

relations function is guided by the organization's mission. In other words, public relations practitioners should always set and follow goals and objectives that support the overall organizational mission.

A second precaution is simply to verify the campaign goal's compliance with organizational goals and objectives. After setting the goal, take a moment to ask yourself if it supports the overall organizational mission. Does it mesh with marketing goals and objectives? Does it cooperate to create an environment in which the organization progresses toward achievement of its goals? It is typically not enough to "not conflict" with the organizational and marketing missions and goals. Truly sound and defensible goals and objectives will enhance and support the overall organizational mission and goals. Figure 4.2 identifies some examples of possible organizational goals. Remember that public relations is responsible for creating the environment in which the organization can reach its goals. Any single campaign, whether designed to solve a problem or to proactively position the organization, must be planned within the framework of the organization's goals.

Identifying objectives to accomplish the goal

Once the goal is set, the challenge is to break down what you want to accomplish into smaller, more specific tasks. If your company's goal is to expand a research program, your public relations campaign may need to set objectives that address securing funding, attracting personnel, and building

OBJECTIVES
Specific, measurable statements of what needs to be accomplished to reach the goal.

Figure 4.2

Examples of organization goals

Business
- Raise stock values
- Increase a product's market share
- Earn maximum profit
- Protect against hostile takeover
- Avoid government regulation of certain issues

Government
- Increase awareness of funded social programs
- Streamline program application and selection processes
- Reduce waste by cutting duplication of effort
- Improve citizen access to information

Nonprofit
- Increase level of government funding
- Expand research program
- Expand dissemination of information to concerned publics
- Systematize provision of care
- Establish a volunteer program

community support for the renovation of facilities. The objectives are specific, measurable statements of what needs to be accomplished for the goal to be reached. Whereas a goal may be somewhat ambiguous (i.e., not defining how much is enough funding or profit), objectives must be absolutely free from ambiguity.

If you read everything written about objectives in the public relations literature, you will discover approximately eight characteristics of good objectives.

- *Specific and clearly defined.* To be free from ambiguity, the task must be specific and clear. It often helps clarity to quantify the objective, and each objective should address only one task. You don't write a single objective to increase awareness of both an issue and an organization. Further, sometimes simple awareness is enough, but more often you need to be specific about what kind of awareness you are seeking. Do you want to increase awareness of an organization's existence, or of its community support activities? Are you specifically targeting awareness of HIV, or of the effect of its transmission to newborns? And what level of awareness are you seeking based on current levels of public knowledge?

- *Written.* This characteristic may appear to be obvious, but too often we begin planning by assuming everyone understands our purpose and objectives. Unless they are written, they

have probably not been well considered, and there may be differing perceptions of what the objectives really are. Further, when objectives are written, they serve as reference points throughout the planning process. When you come to a point of disagreement on any element of the planning process, or when you run out of ideas somewhere in the process, it often helps to go back and review just exactly what it is you are trying to accomplish. Finally, written objectives serve as tangible guides for evaluation and evidence of success.

- *Measurable and improvement-oriented.* It is a given that an objective should be improvement-oriented. It must specify a task that works with other tasks to achieve the goal or solve the problem. But in order for an objective to truly guide the program and demonstrate its ultimate success, it must be measurable. Measurement can be in percentages or in actual figures (dollar amount of funds needed or sales targeted, total number of volunteer hours sought, number of votes necessary). Oftentimes, it is helpful to indicate the measurable target in terms of improvement (sales increased 20 percent from $5 million to $6 million, inoculations administered annually increased 10 percent from 500,000 to 550,000). When you work with percentages, remember to *carefully state* the percent increase or decrease and use

clarifying phrases. Otherwise, you might set yourself up to disappoint management's expectations created by your own objectives. If you want to decrease the percentage of high school students who have experimented with drugs by 50 percentage points, you should follow up that number by specifically stating the decrease (from 75 percent to 25 percent). If you really had in mind a 50 *percent* decrease (rather than a 50 percentage *point* decrease), you would have reduced the percentage from 75 percent to 37.5 percent (or 50 percent of 75). Similarly, a 20 percent increase in participation among a total population of 100 is not 20 people. *The percent increase depends on the current level of participation, not the total population.* If 50 of 100 people are currently participating, a 20 percent increase would be ten people (20 percent of 50), from 50 to 60 participants, or a *ten percentage point* improvement. Be very precise when you state your measurement.

- *Credible.* Being credible simply means that the accomplishment can be directly attributed to the efforts of public relations. If you set an objective to obtain a five percent increase in product sales and then attempt to claim sole credit for that accomplishment you will not only incur the disapproval of your marketing people, but also of top executives who recognize you are claiming credit for improvement for which you are not alone responsible. You will have damaged your credibility with management. Set objectives and then design programs which are obviously responsible for the success you claim.

- *Acceptable.* This characteristic refers to the acceptability of the objective to the organization and its management. To be acceptable, an objective must be in line with and support organizational mission, goals and objectives. It must address issues, problems and improvements that management perceives value in addressing.

- *Realistic and attainable.* Can you really achieve what your objective specifies you will achieve? Keeping objectives specific and clear will help to keep them realistic. But you still need to set your sights on significant improvement. Top management will scorn objectives that are too easily attainable. Executives have little respect for employees and managers who are unwilling to reach a bit, to take some risks, to challenge themselves. Nevertheless, if you shoot for the moon and just hit the stars, you may be branded as having fallen short, even if the stars were all you really needed to reach.

- *Time-bound.* The duration of a public relations campaign is determined by the problem or situation being addressed. Some problems require short, quick efforts (maybe six months to a

year) while others may necessitate longer-range efforts. Some campaigns have built-in deadlines (i.e., publicity for an annual event). Others are efforts to change perceptions and attitudes which change very slowly. Good objectives must identify the time frame within which the program must be completed, and even benchmarks for measurement of long-range campaigns.

- *Budget-bound.* Although you don't always know the budget available for a specific program when you are at this preliminary stage of planning, and you don't want budget considerations to curtail your creativity, innovation and imagination (you might come up with a program the organization believes it can't afford *not* to fund), good objectives take into consideration the probable budgetary range. While you must set objectives to solve the problem and reach the goal, objectives also set the organization's expectations of you and your public relations function. Budgetary limitations may necessitate objectives that create more modest expectations. They may also force greater creativity in your planning. Although larger budgets will lay the groundwork for a more ambitious program, the reality of today's business environment is limited funding.

In addition to the characteristics of good objectives, it is also important to recognize the two basic kinds of objectives, each serving a different purpose but both integral to the overall accomplishment of any campaign. The first kind of objective lays a foundation of information and awareness necessary for any kind of persuasive effort. It addresses the dissemination of information and the increase in awareness necessary among publics before they can develop attitudes to drive the behavior you are seeking. Informational objectives are typically easy to accomplish because you are just spreading information, not attempting to change anything. In fact, much of today's public relations practice is heavily engaged in information dissemination and awareness- or consciousness-raising. Nevertheless, Wilcox, Ault and Agee (1989) contend that it is difficult to measure the accomplishment of such an objective because you are trying to measure a cognitive function (increase in information or understanding) on a sliding scale (how much information or understanding).

Motivational objectives, on the other hand, are more easily measured and harder to achieve according to Wilcox, et al. It is a relatively simple matter to measure a desired behavior. People voted for your candidate or they didn't; consumers bought the product or they didn't; children were inoculated or they weren't. Nevertheless, changing attitudes and opinions, and creating the triggering event to move the public from attitude to behavior, is much more difficult than just disseminating information and

raising awareness of an issue or problem.

Use awareness objectives to lay the foundation for persuasive efforts or motivational objectives. People can't vote the way you want them to on an issue if they are not aware of the issue and its effect on their lives. Consumers cannot buy a new product that will make life easier or more pleasant if they are not aware of its existence. Set awareness and information objectives (with all the characteristics of good objectives) that will lay the foundation for accomplishing your motivational objectives. Keep in mind that disseminating information is easy but motivating behavior is more difficult. You will typically be able to reach a far higher level of awareness than you will behavior. You may be able to inform upwards of 90 percent of your target population on a particular issue. (You'll probably never reach 100 percent awareness; there is always some small percentage of people who travel through life oblivious to just about everything). Nevertheless, 90 percent awareness does not translate to 90 percent motivated to behave. The achievable percentage of behavior will always be lower than the level of awareness. On some issues it may be only slightly lower; on other issues there may be a dramatic difference.

Determining the key publics

The next step in the matrix is to identify the publics you need to reach to achieve your objectives. Remember that a key public may help you achieve more than one objective. It may be helpful to identify which objectives a particular public can aid in achieving so the strategies you write for that public fully contribute to fulfilling those objectives.

Some public relations practitioners prefer to select target publics before they set objectives. They define the problem and determine the publics necessary to solve the problem. They then set objectives that are public-specific. Although this procedure may have some merit (i.e., well-focused objectives), it also has some inherent pitfalls. If you select publics before you have determined specifically what you need to do to solve your problem, you are setting the objectives based on *who* you want to reach rather than *what* you need to accomplish.

A good example is the campaign to increase the number of organ donors on the Brigham Young University campus. Publics were selected for the campaign before objectives were set. It was determined that student Reserve Officer's Training Corps (ROTC) members would be a good target because they were predisposed to the public good represented by organ donation. That is a logical conclusion, but the public was not a practical choice in a campaign for which it was later determined they needed to motivate 10,000 students to sign organ donor cards. Why? Research showed that although the student ROTC members would be easy to motivate, most were already designated organ donors. Further, there were fewer than 200 ROTC members on the campus. With a

KEY PUBLICS
Segmented groups of people targeted with messages to motivate behaviors that support the accomplishment of objectives.

need to motivate 10,000 students which necessitates increasing awareness of at least 15,000 students, spending time and money on a public of only 200 does not make sense.

Further, as you reanalyze your problem and the goal (most often in the evaluation process when it is too late to correct your error before top management notices it), you may find you needed to accomplish a task (or objective) you hadn't anticipated when you selected your publics. If you select publics and set objectives for those publics, you are likely failing to identify some tasks that will be necessary to accomplish the goal. You will probably do a great job of reaching your designated target publics, but there is a real chance that those publics will not be *key* publics, or the ones you needed to reach to complete the tasks that would accomplish your purpose. Don't waste time and money informing and motivating publics that don't need informing or motivating. Success among them will not significantly contribute to improved percentages of participation because they are already participating.

You are much more certain to accomplish your goal if you determine the specific tasks (objectives and benchmarks) necessary to achieve it, and then decide which publics you must reach and motivate to complete those tasks. Your strategies for a public then become the specific tasks you must accomplish with that public to achieve your objectives. If you must persuade one-third of the students in a

MESSAGE STRATEGIES
The ideas you must communicate to key publics to raise their awareness, appeal to their self-interests and motivate the behavior necessary to achieve the objectives.

student body of 30,000 to designate themselves as potential organ donors, you choose publics that are of sufficient mass to contribute significantly to the accomplishment of that task.
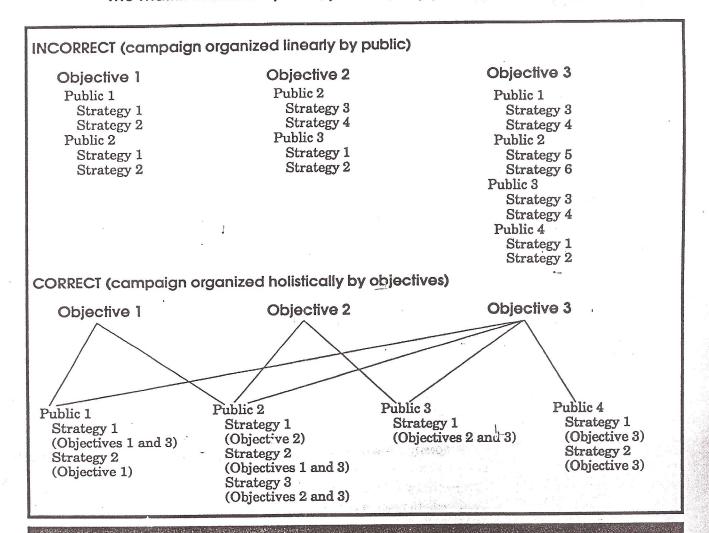
Because this section of the matrix process can be confusing to those accustomed to identifying publics and then objectives for those publics, figure 4.3 has been created to clarify the relationship of objectives, key publics and strategies. A key public will likely be helpful in accomplishing more than one of your objectives. Further, if strategies for publics are planned with a single objective in mind, they may result in tactics that don't integrate well into the overall campaign plan, and in some cases even conflict with each other.

If a key public is viewed in terms of *all* the interrelated tasks necessary for that public to help you accomplish your goal, the strategies designed for that public will be interrelated and mutually reinforcing. Such an approach increases your ability to repeat and reinforce messages, to use economies of scale and to coordinate strategies to enhance their contribution to the overall campaign. Separating publics and strategies by specific tasks or objectives tends to fragment your efforts and loose the advantage of overlap and reinforcement.

As depicted in figure 4.3, fulfilling objective one may require communication with, and action on the part of, publics one and two; objective two may need the support of publics two and three; and objective three

Figure 4.3

The matrix relationship of objectives, key publics and strategies

INCORRECT (campaign organized linearly by public)

Objective 1

Public 1
  Strategy 1
  Strategy 2
Public 2
  Strategy 1
  Strategy 2

Objective 2

Public 2
  Strategy 3
  Strategy 4
Public 3
  Strategy 1
  Strategy 2

Objective 3

Public 1
  Strategy 3
  Strategy 4
Public 2
  Strategy 5
  Strategy 6
Public 3
  Strategy 3
  Strategy 4
Public 4
  Strategy 1
  Strategy 2

CORRECT (campaign organized holistically by objectives)

Objective 1   Objective 2   Objective 3

Public 1
Strategy 1
(Objectives 1 and 3)
Strategy 2
(Objective 1)

Public 2
Strategy 1
(Objective 2)
Strategy 2
(Objectives 1 and 3)
Strategy 3
(Objectives 2 and 3)

Public 3
Strategy 1
(Objectives 2 and 3)

Public 4
Strategy 1
(Objective 3)
Strategy 2
(Objective 3)

may need action from all four publics to be accomplished. Similarly, a strategy written for public three may help to fulfill both objectives two and three, or at least not conflict with other efforts to fulfill those objectives. To succeed here, we must suspend our tendency to think linearly and try to be more holistic in our approach to what actions we need from our publics. If we view objectives and actions as separate from each other, we not only loose the advantage of reinforcing messages and action, but we also run the risk of misunderstanding created by fragmentation and conflicting messages and actions.

As you select the key publics necessary to accomplish your objectives, you should refer to the profiles created based on your research. Your profile should have specifically identified the relevant

STRATEGIES
Public-specific approaches to achieve the objectives.

self-interests of each particular key public, that public's influentials or opinion leaders (intervening publics), and your current relationship with them as part of your strategic cooperative communities.

Because the process of selecting publics, designing messages and planning strategies and tactics to send the messages, is a critical key to success in public relations, the next two chapters in the book have been devoted to extensive explanation of these steps in the matrix. Chapter Five addresses selecting, segmenting and analyzing key publics in more depth. The important point in this more brief overview of those steps as part of the matrix process is that there is no "general" public; you select publics who will help you achieve your objectives and accomplish your goal, and you identify their self-interests and influentials so you can proceed to the next step.

Designing message strategies

Now that you know what you need to do to resolve your problem and whom you need to reach to accomplish that, you are ready to design the messages to be sent to motivate your key publics to do what you want them to do. The message strategy may contain more than one message; in fact it is often a paragraph describing both informational and motivational messages. The message strategy will typically conclude by reducing the lengthy messages to one or two key phrases, sometimes slogans, that will be used repeatedly to reach the designated public.

Message strategies and design are addressed in more depth in the following chapter. Here, it is important to note that good motivational messages tap into the public's self-interest. Always remember that people don't do what you want them to do just because you want them to do it (unless they are close family members who feel sorry for you). Individuals act in what they perceive to be their self-interests. You must determine and appeal to the shared self-interest of the public you are trying to motivate.

Remember that message strategies are typically public-specific. The exception to this rule is the message that sufficiently addresses a shared self-interest among all of your key or target publics to become a campaign theme or slogan. It may be linked to a strategy that finds enough commonality among publics to target them all through the same effort (often an event), although usually in different ways to appeal to differing self-interests and motivations. For example, a campaign to increase awareness of cancer prevention techniques and raise money for cancer research may target all of its publics with a staged event at a local hospital or cancer treatment center that includes blood screening, free mammograms for women, nutritional workshops, informational booths, family activities and food, children's games, a fund raising home crafts bazaar and a five-kilometer fund raising run. Its slogan may be something like "Cancer Prevention in Camas: A

Community Affair."

Nevertheless, promotion of the event would still be reliant on public-specific messages, strategies and tactics, because every public will have a slightly different motivation for attending the event. And the slogan, delivered to all publics through the event strategy becoming a "big idea," will be only one of the messages (and one of the strategies) for reaching your targeted publics and accomplishing your objectives. You will undoubtedly need to separately and sufficiently plan other informational and motivational strategies for each public to fully accomplish your objectives and goal.

Developing strategies and tactics to send the messages

The next challenge is to devise strategies and tactics to get your messages to the publics they were designed to inform and motivate. In the first chapter, we drew an analogy to military strategy. We said that the overall goal to win the battle may include an objective to secure a certain piece of ground or a particular town. The strategy would then be devised to coordinate the effort to achieve the objective. In this case, the strategy may be to weaken the town's defenses and attack through a particularly vulnerable spot in the wall. The tactics supporting the strategy may be an artillery barrage, aerial bombing, a special forces patrol to plant explosives to create a breech, and a ground assault through the wall into the town. The strategy

provides the overall approach to a particular objective answering what and, very generally, how. The tactics are specific plans to achieve the strategy step-by-step.

In a public relations campaign, the strategies are the general approaches to reaching a designated public with the message that will inform or motivate that public. Almost like mini-objectives for that public, they determine what purpose you are trying to accomplish in reaching the public with the message (inform, increase awareness, persuade or motivate to do something, etc.) and how, very generally, you are going to do that (through personal influentials, multimedia, staged events, workplace information campaigns, etc.). Strategies are public-specific.

The tactics that support the strategies identify more specifically how you will send the message within the strategy (i.e., newsletter articles, bulletin boards, payroll envelope stuffers, and letters from the company president in a workplace campaign). Tactics are strategy-specific. Figure 4.4 is a brief example of strategies and tactics developed to send specific messages to a target public within a broader campaign. Appendix A contains a more in-depth example of the matrix steps in a campaign plan, including public-specific messages, strategies and tactics.

This portion of campaign development requires high levels of creativity. The matrix process provides the framework or strategic structure to ensure that your creativity is on target in terms of solving your

TACTICS
Strategy-specific communication tools that carry the message to key publics.

Figure 4.4

Sample strategies and tactics to send specific messages to one target public

Statewide campaign to reduce abuse of illegal and prescription drugs

Key public
Rural high school students: This public, aged 14 – 17, are students in high schools ranging in size from 100 to 750 students in communities of 10,000 or fewer residents. Being from a small town, most are from families whose livelihoods are tied to agriculture and animal horticulture in some way, many currently living on farms or ranches. The small town atmosphere is fairly conservative, and typically puts the high school at the center of social and community activities, and the community is highly concerned for the welfare of its children. The students are influenced primarily by peers and peer leaders, teachers and parents. Their relevant self-interests include peer acceptance, social activities and the welfare of friends and neighbors. They are also concerned about the future, although probably not as much so as they are concerned about fun and acceptance now.

Message strategy
This public will be influenced by peers and peer leaders, and by teachers and parents whose advice and counsel they trust. The message should be that it is cool to stay clean, and that friends make sure friends stay clean. Other message elements may be that drug addiction destroys lives and is not fun, that real fun is clean fun. Slogan: Be fun, not fried.

Strategy 1
Increase awareness among rural high school students that drug abuse destroys fun and friends through an in-school information campaign.

Tactic 1
Curriculum packets for social studies (modern problems) teachers including a sample lesson plan, statistical handouts on drug abuse, junkie vignettes and antidrug testimonials on video, classroom posters, and other learning activities demonstrating the dangers of drug abuse among teens in today's society.

Tactic 2
Presentation to student council by mayor and city council members on the problem of drug abuse and statistics from the local community.

Tactic 3
Drug abuse fact sheet insert as bookmark in textbooks for required subjects.

Tactic 4
News feature release to school newspaper on the problems and results of drug abuse with local angle on the high school.

Strategy 2
Persuade rural high school students to stay clean through peer leader influence and multimedia campaign.

Tactic 1
School assembly conducted in early September by student body officers and student council with guest appearances of local and state rodeo stars introducing "It's cool to be fun, not fried."

Tactic 2
Student council-sponsored "fried" egg homecoming breakfast to kick off homecoming activities.

Tactic 3
"Cool to be fun, not fried" t-shirts and shorts day with hamburger and hot dog lunch prepared by the teachers ($1 per shirt — lunch free to all wearing shirts).

Tactic 4
Contest between modern problems classes to develop PSAs for local radio station with pizza party for winning class.

Tactic 5
Contest among art students for the development of antidrug posters with $250, $150, and $100 scholarships for the winning entries. Posters placed on school's web site and hung in the school.

Tactic 6
Stay clean pledge hayride and barn dance. A list of students making the pledge could also be posted on the school's web site.

problem. Once you have focused efforts on a particular public, and you know what messages you need to send to motivate the desired action within that public, you must draw on creativity to devise strategies and tactics that break through all the other information and persuasion clutter with which your publics are bombarded. You have to create strategies and tactics that will cause the target public to *select* your messages, *retain* them and *act* upon them. The two chapters that follow address this process in detail.

Calendaring and budgeting

The next two steps in the matrix process require very specific detail to schedule and budget your campaign plan. Much has been written in the public relations and business literature on calendaring and budgeting but a few important points need to be emphasized.

First, it is important to remember that a calendar and a budget are part of the *strategic* planning process. They should be considered carefully so that timing and cost are addressed within the overall framework of the organization's goals as well as the campaign's objectives. Tactics and events should be scheduled to obtain the maximum benefit, and especially reinforcement from other scheduled tactics. For example, some events work best as kickoffs and others as culminating events. Media tactics provide a foundation of information and promotion as well as follow-up reporting and reinforcement. Scheduling of tactics should be

thought of as strategic, and the timing should be well-considered.

In a comprehensive campaign proposal, scheduling the implementation date of each tactic is sufficient (i.e., date of news release or staged event). Once the campaign receives approval and you begin the implementation phase, it is important to create a more detailed calendar that identifies preparatory tasks as well. It is wise to plan preparation backwards from the planned implementation date. For example, if a brochure must be ready for distribution in a particular mailing, you should plan the final printing date a few days prior to the mailing, blue-line proof date sufficiently prior to that, copy and paste-up delivery to the printer an appropriate interval before the blue-line date, finalizing and approval of copy before that, and so on. Each step of the process (especially allowing sufficient time for approvals) should be planned back from the date you actually need the final product, and each of those tasks should be calendared to ensure the tactic is ready for the implementation scheduled in the comprehensive campaign.

The budget should also be considered strategically. The issue shouldn't be just total cost, but also who should pay and how. Really creative campaigns find solutions to budgetary limitations that actually result in greater persuasive power. Recruiting volunteers to do work that would have been a budgetary item results not only in lower cost, but also in greater support and advocacy from influentials in a

community. Enlisting corporate support of nonprofit campaigns often strengthens the credibility of the appeal. Combining with other actors in a strategic cooperative community to share costs provides a unity of action that is more persuasive and more far reaching than acting unilaterally. Even requesting small contributions from target publics (like $1 admission to an event with the proceeds — after cost — donated to a relevant local charity) can be effective. Making something free doesn't always make it appealing. In fact, many people consider that something free may not be worth their time. Among certain publics, you are more likely to get attention and participation if there is some monetary investment — no matter how small.

The best format for a calendar is a modified Gantt chart that allows you to view the schedule for each tactic by strategy and by month. Both the calendar and budget should detail tactics by public and strategy. Figure 4.5 calendars the strategies and tactics developed in the partial campaign plan in figure 4.4, and figure 4.6 demonstrates a convenient format for budgeting. Organizing your calendar and budget by public and strategy allows your client or corporate executive to quickly determine when tactics will target a specific public and how much that will cost. It also provides an easy "line item veto" when your client wants to eliminate a public or strategy for any reason. It is a simple matter to delete that section of your plan and subtract the cost from the total. In a

minute or so you have the revised budgetary figures, without having to return to your office to figure out how much of each budget item was allocated for the deleted plans. You are much more aware of the cost of information and persuasion efforts among each of your key publics, and you are conversant in the interactive scheduling of the campaign by public.

Communication confirmation

The previous steps in the planning section of the strategic program planning matrix have required an analytical approach to determining what you need to accomplish, who you need to reach to accomplish that, what messages you need to send those publics to motivate them by appealing to their self-interests, and how to send those messages. Although the planning is analytical and is completed one public at a time to ensure your research and knowledge about a particular public drives the formation and delivery of messages to that public, the nature of the written planning process necessitates a way to check or confirm that your planning decisions are consistent with what you know about the publics. The most effective way to check the soundness of your analysis and planning is to tabularize a shortened version of your planning decisions such that you can confirm they employ good reasoning. Figure 4.7 is the communication confirmation table generated from the partial campaign planning illustrated in figure 4.4.

Figure 4.5

Sample calendar for one target public

Statewide campaign to reduce abuse of illegal and prescription drugs

Public: Rural HS Students	September Week				October Week				November Week				December Week			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
Strategy: Awareness																
Curriculum packets	✖															
Student council presentations	✖	✖	✖													
Text insert (bookmark facts)	✖															
News feature release		✖	✖													
Strategy: Persuade clean																
School assemblies				✖	✖	✖	✖	✖								
Homecoming breakfasts					✖	✖	✖	✖	✖	✖						
T-shirt day and lunch							✖	✖	✖	✖	✖	✖				
PSA contest					✖											
Run PSAs						✖ ――――――――――――――――										✖
Poster contest								✖								
Place posters									✖ ――――――――――――――――							✖
Hayride and barn dance												✖				

Use the communication confirmation table as a test of the appropriateness of your planning. It *confirms* the alignment of your messages, strategies and tactics with your purpose and what you know about your publics. Review your plans for each public and list the self-interests, influentials, strategies and tactics, and messages for that public horizontally in the table. From the confirmation table, you can easily check to see if the relevant self-interests you determined for your public are incorporated into the message, if the public's influentials are being used appropriately, and if the strategies and tactics selected to deliver the message are appropriate for that public. You will undoubtedly discover that the table reveals discrepancies in logic that you missed in your written plan. Have you selected midday television talk shows to reach high school students? Did you plan to run PSAs during drive time to reach housewives? Have you designed a message about money-saving features to a public that is less concerned about money and more concerned about safety? Are you using video news releases to send a complicated message better

Figure 4.6

Sample budget for one target public

Statewide campaign to reduce abuse of illegal and prescription drugs

Public: Rural HS Students	Per Item Cost	Total Projected	Sponsored Credit	Actual Projected
Strategy: Awareness				
Curriculum packets (3 each/150 rural high schools):				
Lesson plan by state teacher's association (450 copies/5 pages)	$.15	$67.50		$67.50
Video by National Drug Abuse Prevention (450 copies)	5.00	2,250.00		2,250.00
Posters (450)	.25	112.50		112.50
Statistical handouts (450)	.03	13.50		13.50
Delivery (450)	3.00	1350.00	.00	1350.00
Student council presentations (developed and conducted by mayors and city councils)	.00	.00	.00	.00
Text book insert bookmark (average 500 students at 150 schools=75,000) deliver with packets	.10	7500.00	.00	7500.00
Feature release (150+mail)	.35	52.50	.00	52.50
Strategy subtotal		**$11,346.00**	**$.00**	**$11,346.00**
Strategy: Persuade clean				
School assemblies	.00	.00	.00	.00
Homecoming breakfasts (average 400 students at 150 schools=60,000 by local businesses and state corps)	.75	45,000.00	45,000.00	.00
T-shirt day/lunch (food by school with/PTSA subsidy if needed/T-shirts 400 x 150 schools=60,000 shirts at $1	1.00	60,000.00		60,000.00
Shipping UPS (150)	7.50	1,125.00	1125.00	
PSA contest/pizza party prize (150 schools x 8=1,200 pizzas/half price local store)	63.92	9,588.00	4,794.00	4,794.00
Run PSAs	.00	.00	.00	.00
Poster contest ($500 in scholarships x 150 schools=$75,000 from state corps)	500.00	75,000.00	75,000.00	.00
Place posters	.00	.00	.00	.00
Hayride/barn dance (ride and facilities by local ranchers/allotment of 200 x 150 schools for food/music)	200.00	30,000.00		30,000.00
Postage to mail checks	.32	48.00	.00	48.00
Strategy subtotal		**$220,761.00**	**$125,919.00**	**$94,842.00**
Public subtotal		**$232,107.00**	**$125,919.00**	**$106,188.00**

conveyed in newspaper features or op-ed pieces? Check your logic, and then go back and make any appropriate changes.

Planning the evaluation

Evaluation is relatively easy if it is planned from the beginning of a campaign. The most useful evaluation owes a debt to good objectives. Two steps must be considered in evaluating any plan. First, by what criteria should we judge success; and second, how are those criteria best measured?

Criteria are automatically set when objectives are set. Objectives are designed to provide direction to planning, and to identify a means for evaluation. Clients and managers will judge success by the criteria (objectives) you have set. In this step of your plan, you should restate your objectives in terms of success, and designate an appropriate method for measuring each one. For example, if one of your objectives is to increase name recognition of your client from 30 percent to 80 percent, the criteria for success would be written, "Eighty percent acknowledged recognition of the client's name." The evaluation tool would probably be a survey at the completion of the campaign which would include a measure of name recognition and be compared with a benchmark survey initiated prior to the campaign. Without adequate planning for evaluation the benchmarks are often not taken in the beginning, resulting in no data for comparison. Unless you know what level of awareness or recognition you started with, you cannot evaluate your efforts as successful.

This process also points to the necessity of reviewing your calendar and budget to ensure that evaluation tools are included. You may wish to designate a separate section of the calendar and budget which specifically addresses the planned evaluation. Or you may choose to include evaluation as part of the strategies and tactics for each public. Only with this kind of planning can you ensure that appropriate benchmark research is done in the beginning and throughout the campaign to compare with evaluation research. It also enables you to incorporate appropriate evaluation in the detailed planning for tactics. For example, if you need to measure the number of attendees at events, or number of visitors to a display, you will build into the tactic a method for tracking those numbers. Trying to guesstimate such figures later only causes your evaluation to be inadequate, and your claim to success suspect.

Each objective must be converted to an evaluation criteria and each criteria must designate a tool for measurement. The measuring tools are essentially research tools. You may do surveys or count sales or access attendance records. The rules of research apply in evaluation, more particularly because your evaluation of the campaign then becomes part of the background research for subsequent efforts.

In addition to evaluating each objective, you may choose to establish other criteria for evaluation of success. Although you are specifi-

EVALUATION CRITERIA
The standards set to measure the success of a campaign.

EVALUATION TOOLS
The methods used to gather data needed to assess whether or not evaluation criteria were met.

Figure 4.7

Sample communication confirmation table for one target public

Statewide campaign to reduce abuse of illegal and prescription drugs

Key Public	Self-interests	Influentials	Strategy	Tactics/tools	Message
Rural HS students	Peer acceptance Fun Friends	Teachers Local leaders	Awareness of drug dangers through in-school info	Curriculum packets (lesson, video, posters, handouts) Mayor presentation to student council on local problem Bookmark facts in textbooks News feature release to school paper (localized)	Drug abuse is not fun. It destroys lives.
		Student leaders Peers	Persuade to stay clean through peer influence and multimedia	Student leaders conduct assembly with rodeo stars to introduce campaign Student council cook "fried" egg homecoming breakfast T-shirt and shorts day with teacher-prepared lunch PSA contest among classes with pizza party prize PSAs run on local radio Poster contest for art students with 3 scholarship prizes Posters displayed in school and on Internet Stay clean hayride and barn dance w/pledges on Internet	Stay clean, help your friends stay clean. It's cool to be fun, not fried.

cally evaluating the campaign and whether or not it accomplished the goal or solved the problem, your clients and supervisors are probably also evaluating you and your team's professionalism and ability to meet their needs. You may wish to add evaluation factors that specifically address your capabilities in community relations, media relations or some other skill area.

While it is unwise to set an objective for media placement because it tends to demonstrate manipulative tendencies which are expressly forbidden in the PRSA code of ethics, it is perfectly acceptable to set an evaluation criteria that measures your success at placement couched in terms of media *relations*. While an objective for 60 percent favorable coverage or 75 percent news release placement sets a manipulative course that is fatal to good relationships with media, evaluation criteria that

measures such coverage and placement would examine the quality of the writing and information provided and the adequacy with which you identified and met the needs of media contacts. The first course is manipulative; the second seeks to evaluate and improve media relationships.

Similarly, you may seek to evaluate your performance at staging and promoting events or any other accepted public relations tool. Although these evaluations are not specifically determining whether or not you achieved your objectives, they are crucial to improvement of your public relations efforts and demonstrating your expertise, professionalism and value to the client or organization. Converting your objectives to evaluation criteria is your primary evaluation. Additional criteria that address your team's specific capability and expertise are highly useful secondary criteria.

Summary

The strategic program planning matrix guides the planning process in public relations and problem solving. It is the analytical tool that ensures research data and information are applied to solving the problem at hand. This matrix requires that good information, sound reasoning and clear logic drive the decisions regarding what objectives you need to accomplish to solve the problem, what publics you need to reach to solve the problem, what messages you need to send to motivate them to help you, and what communication tools (tactics) will ensure they select and act on those messages.

The matrix also transforms calendaring, budgeting and evaluation into strategic functions. It ensures that the public relations process is not just a succession of steps to be completed, but that it is an interactive, integrated methodology for finding the best and most timely solution for the most appropriate cost. And the matrix completes the process with evaluation, which lays the foundation for a continued successful public relations function.

Chapter Four exercises

1. Develop an entire public relations plan for the nonprofit organization you identified in the previous chapter's exercises. Make sure you set a goal that overcomes the problem you identified, and use your research to complete each step of the strategic program planning matrix to reach that goal.

2. Experiment with developing calendar and budget templates on your home computer. Then pick an event, like a craft fair or a cycling race,

and calendar and budget communication tactics for promotion and publicity.

3. Spend some time on the telephone talking with printers, newspapers and radio stations about the cost of producing communication products. How much does it cost to do a brochure? What are the variables in pricing (i.e., colors, number of folds and paper stock). What does it cost to prepare a print ad? How much to run it? What are the variables (i.e., size and placement)? What does it cost to produce a radio spot? How much to air it? What are the variables (i.e., talent and length)?

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