The Art and Science of Public Relations & Strategic Communication

THE ART AND SCIENCE OF PUBLIC RELATIONS & STRATEGIC COMMUNICATION

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INTRODUCTION TO PUBLIC RELATIONS & STRATEGIC COMMUNICATION

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"Public sentiment is everything.
With public sentiment nothing can fail;
without it, nothing can succeed."
—Abraham Lincoln (Lincoln-Douglas Debates, 8/21/1858)

"Change the things your heart desires…Change the ways of this changing world."
—Woody Guthrie, "Changing World"

First, a Story…

The year is 1860, and there's a man standing on a street corner in New York City holding a brick.[1]

Very carefully, he bends down and places the brick at a 90-degree angle to the street. Seemingly satisfied, but saying nothing, he carries another brick to a second intersection. This time, there's another brick already there, also at a 90-degree angle to the street. He picks up the brick and replaces it with the one in his hand, placing it parallel to the street.

Still silent, the man walks down the street. A crowd is beginning to form.

"What's with the bricks?" someone asks.

No response from the man, who continues on his course, brick in hand.

He walks toward the next intersection, pauses, and enters a museum. About a dozen people follow, paying the cost of admission to solve The Mystery of The Guy with The Bricks.

Never speaking, our protagonist lingers in a museum full of oddities for a few minutes. He exits the museum, and starts once again down the route, attracting an even larger crowd, once again placing bricks at intersections. He remained there every day for a week, drawing large crowds on the sidewalk and into the museum. Eventually, a police officer stopped him because the crowds were an impediment to traffic.

Was this the first public relations idea?

As it turns out, The Guy with the Bricks approached the proprietor of the museum asking for money. For its part, the museum was having issues attracting patrons.

The museum owner — none other than P.T. Barnum — gave him money to buy a meal, and told him to return the next day for a job with decent pay and easy hours. The man was told it would be a peculiar job that involved remaining completely silent and laying down bricks at a few different intersections. The man complied and carried out his task.

The arrangement worked out for both parties. The Guy with the Bricks earned a living, and the hundreds of people who followed him into the museum more than paid his salary.[2] And Barnum gained attention for his museum – not just from gathered crowds, but from the notoriety earned from the idea.

Image from page 103 of P.T. Barnum's 1890 book, Dollars and sense, or how to get on; the whole secret in a nutshell.

The Takeaway

P.T. Barnum was more than willing to attract crowds by almost any means necessary. As he put it, "every crowd has a silver lining." He was generally well regarded by members of the public, who enjoyed seeing what he'd do next to drum up business. Today, many of his strategies and tactics — though wildly creative — would be deemed unprofessional, unethical, and occasionally illegal. At the same time, Barnum's story and tactics highlight how communication can be strategically harnessed to influence the public. He may not have been the most ethical communicator, but Barnum was a key figure in the development of using communication to influence public perception.

We'd like to believe the field of Public Relations has matured since the time of P.T. Barnum, that we've risen above the purely entertaining and completely distracting stunts. But that isn't strictly true. A sizable chunk of the public believes that PR is essentially a blend of damage control and Barnum-inspired publicity stunts. The technological tools may have changed, but the underlying communication objectives have not.

The next couple of chapters will delve a bit deeper into some of those thornier ethical issues.

For now, though, it's time to clear up some initial definitions, because Public Relations and Strategic Communication involves a lot more than masonry-related anecdotes from the 19th century.

What We'll Cover:

Public Relations: A Brief Overview

Founded in 1947, the Public Relations Society of America (PRSA) is recognized as the foremost organization for Public Relations practitioners. Similarly, the Public Relations Student Society of America (PRSSA), founded in 1967, is considered the most important organization for PR students. Thanks to these two organizations, in large part, the definition and practice of Public Relations has substantially changed since the 19th century, becoming a vital part of corporations, nonprofits, governments, and entertainment industries among others.

While the term "PR" is used frequently in public discourse, defining PR can be a difficult task. An academic researcher in the late 1970s administered a survey in the hope of defining PR and concluded that the answers were "so diverse and conflicting...so uncertain and inadequate, that hardly any two of them have been alike or even similar."[3] Even today, no PR job is the same, and each client requires a different strategy.

In 2012, PRSA crowd-sourced a definition, asking practitioners to define PR, as its own definition had not changed since 1982.[4] After reviewing nearly a thousand submissions and requesting additional feedback on its work, PRSA designated three "finalists" for the official description of PR.[5] From those finalists, the organization announced the winning — and today the most commonly accepted — definition of PR: "**Public Relations** is a strategic communication process that builds mutually beneficial relationships between organizations and their publics."[6] For its part, PRSA offers it as *a* definition, rather than *the* definition of PR, because, again—"No two public relations jobs are the same."[7]

If we unpack that definition a bit, it becomes clear that PR is not just a one-off attempt to garner favorable publicity, rather it's a process under the umbrella of *strategic communication*.[8] The primary focus is on building relationships between an organization and (subsets of) the general public. Although PRSA identified a desire to avoid the use of jargon in its definition, the term "publics" managed to find its way in there. It's not a typo; it's an important term to understand. Let's dig into that word a little more.

> "*A public is like your family.*
> *You don't pick them; they just are—*
> *like generous Cousin Ezekiel and crazy Aunt Bertie.*
> *A public may be helpful or annoying, friendly or not,*
> *but an organization must deal with each regardless.*"
> —Ronald D. Smith[9]

The term **public** in Public Relations refers to a group of people whose members share common interests or values in any given situation.[10] Consider your own activities, hobbies and interests — chances are, you're a member of a wide range of different, sometimes overlapping, publics.

There are an infinite number of publics. For example, take Travis Kelce, a professional football player for the Kansas City Chiefs. You may think of his fans as a public. Then again, we could break that public into multiple publics. Some may be fans from his reality TV show, *Catching Kelce*. Others may like him from television ads where he promotes COVID shots. Or some might be fans of his nonprofit work in the local community. Other publics may include people who are Swifties – Taylor Swift fans – who like him because he likes Taylor. (Who knows what happens with this public if they break up!) And then we have football fans, Chiefs fans, fans of the

University of Cincinnati where he attended school, and even people who have Kelce on their fantasy football roster. Each of those publics has varying strengths of ties to Kelce. Some are transactional and short-term, and others are deep-seated and will endure over time. The more you study any situation, the more publics will emerge.

The basic idea is that PR practitioners generally act to build and strengthen relationships with members of publics that are key to their organization's success.

Are "Publics" Problematic?

In recent years, scholars have come to believe the concept of publics is problematic and undesirable. In this view, organizations are seen as communicating messages for the sole purpose of manipulation — and that approach is fundamentally wrong. Put simply, it's propaganda.

Alternatively, our world is interconnected. Some "publics" might include people who typically don't have power or a voice – animals, the environment, future generations. In this view, responsible actors move beyond a corporate or managerial view of publics, and consider a broader spectrum of the publics that are often overlooked.[11]

Do you agree with this view? Why or why not?

New definitions of "publics"

Michael Warner has shifted the constitution of publics. He believes that communities can be organized through specific messaging and discourse. These publics are self creating and self organized – the message itself is what unifies strangers in the public sphere. (Public and Counterpublics, New York Zone Books)

Some experts categorize publics as either primary or secondary, and also conceptualize them as latent, aware or active.[12] A **Primary Public** is one that is absolutely essential to the success and functioning of an organization. A **Secondary Public** is still important to an organization, but their support isn't as critical for success or is simply "nice to have." Publics may also be characterized as active or inactive depending on the audience. A **Latent Public** is dormant because that group is not aware of, or involved in, a particular situation — but they could be motivated to join a public.[13] An **Aware Public** emerges from a Latent Public that develops after they recognize a problem or see an opportunity in a situation, and they begin to actively monitor the situation. An **Active Public** is the final "life stage" of a public, and develops as an Aware Public begins to actively participate and exert influence on the outcome.

A final term related to publics is **Stakeholders**. In theory, there are differences between stakeholders and publics. Stakeholders are identified according to their relationships to organizations, while publics are identified according to their relationship to organizational messages.[14] Another way of thinking about it: Organizations essentially choose their stakeholders through their marketing strategies, partnerships and investments, while "publics arise on their own and choose the organization for attention.[15] To put it even more simply, stakeholders are "insiders" and publics are "outsiders." In practice, however, "stakeholders" and "publics" are often used interchangeably, as "stakeholders" typically references those aware and active publics who have the most to lose or gain in any given situation.

In the field of Public Relations, strategically communicating to each of these different audiences is essential. As such, PR practitioners have to carefully segment the general public into smaller publics, or **target audiences**, to get the right message, to the right audience, at the right time. For our purposes, an audience becomes activated through a campaign – targeted at them to act – and then go back to becoming a public once the campaign is finished. Target audiences – those segmented publics we're calling on to act — is a common term in Public Relations.

However, audience segmentation is not something that solely belongs in the domain of Public Relations. Marketing and Advertising also engage in similar practices, so before we go any further, we'll turn our attention toward these closely related fields.

Public Relations, Marketing & Advertising

Public Relations, Marketing, and Advertising are constantly evolving fields of study and practice. Practitioners use different technological innovations, which can alter and blur boundaries between the related endeavors.

The American Marketing Association (**AMA**) has, since 2017, used the following definition: "**Marketing** is the activity, set of institutions, and processes for creating, communicating, delivering and exchanging offerings that have value for customers, clients, partners and society at large."[16] Since the mid-20th century, the key factors in marketing have been referred to as the "marketing mix" or "**Four Ps**": Product (what's being sold), Price (how much it costs), Place (where it's sold and promoted), and Promotion (how it's promoted).

Despite some academics and practitioners wanting to add more Ps to the list — People, Process, Physical

Environment, Packaging — or editing the marketing mix altogether in favor of something like the "Four Cs" (Consumer, Cost, Convenience, and Communication), the Four Ps have proven durable.

With respect to Advertising, the AMA uses the following definition: "**Advertising** is the placement of announcements and messages in time or space by business firms, nonprofit organizations, government agencies, and individuals who seek to inform and/or persuade members of a particular target market or audience regarding their products, services, organizations or ideas."[17] As with the definition of Marketing, it may not be concise, but it's fairly descriptive.

Until recently, the divisions between Public Relations, Marketing, and Advertising were reasonably distinct. PR focused on image maintenance, earning media attention, and developing relationships. Marketing focused on promoting services and products to gain revenue for an organization. Advertising focused on paying for media coverage of messages, products, and services for an organization. There was some overlap, to be sure, in areas such as branding and storytelling.

Since the beginning of the 21st century and the widespread adoption of social media, these once distinct fields have overlapped more and more. This is part of a larger trend of media convergence, a phenomenon where the lines between media producers, consumers, and distributors have blurred.[18] For PR practitioners, this may have blurred the lines with Marketing and Advertising but opened up new ways of connecting to publics and earned media opportunities.

Say, for example, that an organization decides to partner with an influencer to create content that appears on social media platforms and also links back to an owned website through affiliate links. That's a fairly commonplace scenario, and it would take a moment to disentangle precisely where the boundaries of PR, Marketing, and Advertising begin and end.

The media landscape has changed quickly, and practitioners are frequently being asked to do a little bit of everything. That's where Strategic Communication comes in.

Strategic Communication: A Brief Overview

Since the 1930s, researchers have called for an integration of Public Relations, Marketing, and Advertising.[19] A variety of terms have been used to describe the blend, including Marketing Communications ("Marcom"), Communications Marketing,[20] Integrated Marketing Communications (IMC)[21], and Strategic Integrated Marketing Communications.[22] Of those, IMC remains the favored term.

Strategic Communication is similar. Whereas IMC is focused more on achieving revenue goals, Strategic Communication is focused more on achieving organizational goals. For our purposes here, we'll borrow from a couple of the more popular definitions: "**Strategic Communication** is the purposeful use of communication by an entity to fulfill its mission and engage in conversations of strategic significance to achieve its goals and objectives."[23] It has emerged as a preferred term in recent years, because it more accurately represents the modern-day practice of PR, which is multifaceted and includes elements of both marketing and advertising.

Today, practitioners operate in a hybrid media system that combines new and traditional forms of communication.[24] Organizational storytelling occurs simultaneously through paid, earned, and owned media channels. Leading researchers believe the future of PR will merge several complementary professions under one discipline.[25],[26],[27]

Public Relations, Marketing, and Advertising have always had more similarities than differences. Thanks to new technology, practitioners will need a well-rounded skill set to navigate the blended media environment.

Focus of the Text & Key Terms

This text begins with Public Relations as the centerpiece, and expands to include Strategic Communication more broadly. In a sense, think of PR as the primary focus, with concentric circles drawn around it to form a larger whole that is Strategic Communication.

Each of those concentric circles are in constant motion, so this text is an attempt to capture a picture of a rapidly changing environment. As one PR scholar put it, "public relations is a piece of some whole. The challenge is to continue to search to discover the whole and public relations' place in it."[28] This text investigates, documents, and explains "the whole" of PR that we'll simply refer to as Strategic Communication.

The terms "company," "organization," "customer," and "consumer" will do a lot of heavy lifting in the text as well. When "company" or "organization" are mentioned, it could refer to anything from a nonprofit to a government agency, political candidate, religious organization, school, sports team, law firm, or entertainment figure — just to name a few examples. When "customer" and "consumer" are mentioned, it could refer to website visitors, buyers, subscribers, donors, volunteers, applicants, voters, and fans — again, the list could go on and on.

These terms are simply shorthand for larger ideas. While there may be some substantial and important differences between them, the key takeaway is that ideas that fall within the realm of PR and Strategic Communication may be applied to a wide range of situations. In its description of PR, PRSA states that practitioners tend to specialize in one or more of the following areas:

- Corporate Communication
- Crisis Communication
- Executive Communication
- Internal Communication
- Investor Relations Communication
- Marketing Communication

- Integrated Marketing / Integrated Marketing Communication
- Media Relations
- Content Creation
- Events
- Social Media
- Multimedia
- Reputation Management
- Speechwriting
- Brand Journalism[29]

Experts Talk Back:

Three Questions with Alyssa Giaimo, Digital Marketing Manager at After School Matters

After School Matters is a nonprofit organization based in Chicago that provides after school and summer programs for teens who primarily come from marginalized communities. The organization helps nearly 20,000 Chicago teens each year learn new skills and connect with community leaders.

Q: In the interest of full disclosure, you were in my PR classes not too long ago. Now you're in the first few years of your career, and you're already doing some really fun and interesting things. If you wouldn't mind, let's start with a quick overview of your path from graduation to where you are now.

So initially, I was at a PR firm for about six months, and didn't really love the PR firm style — I didn't resonate with a lot of the clients that we had. They brought on a pipeline company, and a gun-manufacturing company, and I was like "this isn't me."

Then I started working at a nonprofit because I had one nonprofit client at the PR firm, and I was like, "I love this, this is great." So I went to World Pulse and helped women with this online platform to communicate with one another to share their stories and connect on all sorts of issues. And there were hundreds of thousands of women across the globe, so it was a really big audience. And I was doing newsletters, social media — similar to what I'm doing now. I was there for a year and a half or so.

And then the pandemic happened, and I wound up moving to Chicago, and volunteered at an urban farm here, and found out about After School Matters through one of the teens who was in an After School Matters program who was volunteering that day. And I was like, "that sounds so cool," because I've always been interested in youth development, education, and giving people the opportunity and resources to prosper.

So I saw that they were hiring, and here we are. Now I do digital marketing content, strategy, social, newsletters to all the different audiences—so having to tailor that for donors, and then talking to parents, and then talking to community members, and to teens — and all of that differs a lot…so still having that organizational tone to everything, but being sure that it's accessible to those that we're speaking to. So that's the condensed version, but I'm really enjoying where I'm at right now.

Q: I'd like to learn more about your experience in working at a PR firm where you have multiple clients versus advocating for a particular organization. You mentioned liking your current job more than the PR firm, but could you talk a bit more about what you liked and didn't like during your time at the PR firm, and how that experience led you down your current path?

I really enjoyed the PR firm for a bit there. It was only toward the end that they got some new clients. I loved being able to work with passionate people from those different companies or organizations, and try to home in on what they're trying to do, and make it the best that it can be.

With that being said, there were lighter touch points—I wouldn't be communicating with them all the time, as I am working in-house for just one client right now. So that was nice in the vein of being like, right now I'm working on a corporate newsletter. I'm touching base with them on Friday, and it's Monday, and I'm working on it in the midst of my other projects, so it gave me an opportunity to manage my own time. There was a learning curve to that too, where it was like "I'm working on these two clients these days, and then these three the next day" — or whatever. Or am I shifting back and forth? And that can sometimes get complicated because with different clients, you're doing different types of projects — for example, social, and a year-end report, as well as a newsletter—but I like a variety of content, and I think what I really enjoyed there is I'd be challenged with so many types of different projects.

But it was challenging to get a new client, figure out their tone of voice, and run with it and do well at it. Because for me, I feel like I need a little bit of time and opportunity to educate myself and understand what they're doing as a company or organization, their voice, their vision, their mission—whatever—to be able to authentically speak for them. So that's huge, but at the same time, with all communication roles, I feel like it's a very fast-moving career, and everything is changing all the time, so I liked that. I liked that it was very different, and that it challenged me.

With that, some clients had things that needed to go through multiple iterations, multiple rounds, and learning how to communicate about "well, we went this route because of this." So being able to find a common ground: Being able to advocate for my expertise, and also having them share that "we've done this, and this is what we like, and that's what we want to go with." So my soft skills and human connection skills were really strengthened through that opportunity, especially when the clients were pretty engaged, and connected to the work that they were doing.

I had one client with a school district, and we were trying to get a bond and a levy passed for them because it was a public affairs public relations firm, so they all had some sort of public affairs component, and that was the one that resonated with me the strongest. Because this team — this group of people — care so much about these students, and these employees, and they want to make it the best building that it can be, and the best district it can be, et cetera. And I think that group of people really spoke to me to the point where I wanted to be on their team. Because their camaraderie, their connection, their collaboration was so real—and just to be that one extra person to help create their plan and their strategy was really special.

So that's kind of what led me to realize that the nonprofit route and being able to be with people who are really passionate and connected to a vision and a mission really resonated with me, and being able to progress and evolve with that client would be really special, rather than: It's a six-month contract; see ya later. But that's fun, too: To let go and be done with things.

Q: What advice would you give to someone reading this textbook: They're in college, they're interested in strategic communications or PR generally — what advice would you give them in terms of what they study, skills they should have — or even some things you wish you would have known when you entered the workforce?

There's a long list that I could come up with, but one thing I think for all people — especially people in this field — is to stay up to date with the news to the best of your ability. It depends on where you work, of course, but with me being in Chicago, knowing Chicago news is pretty imperative. It's a big thing in my job, especially with teens that might be mixed up in things — we need to know about it, and it's a huge city.

So I think staying up to date on local news, and some global news and just understanding social, digital, and marketing news is really huge, and it also makes you a stronger communicator, and it gives you a better opportunity to be more intentional with the content you create, with the outreach you might have for a client, or whatever it may be. Because being able to understand the climate that's going on — you don't want to sound tone-deaf. So that's just a huge thing.

I'd also say just show up every day and do your best. That sounds cheesy, but at the end of the day, to create quality work, you want to be proud of yourself.

So that, and striving to get inspiration from other organizations, other companies, other websites. Like we're doing a website redesign right now, and that's been a huge project for me: Looking at other websites: what are they doing; how is it oriented; what is the user experience like. And it's not copying, it's just being able to draw inspiration and use that to better amplify what you're trying to do and what your product is, or work is. So regularly consuming content that's related to what you do, or what you have to be doing for that client will really benefit you. I followed so many other nonprofit orgs on social, and it helps me get ideas, too, and also celebrate what they're doing at the same time.

Another thing is you should always be a cheerleader for yourself. I was at this organization that I loved so much, I was there for a year, and at nine months, I was like "I'm doing more work than what my job title is, and I love this, and I want to be here, and I love this team, and I want to do this, but I need a raise, and I need a title change, and I need other departments throughout the organization to know that I have a strong role here, and I'm the person to come to." And that takes a level of comfortability with the team, and gaining confidence. I got the title change, I got the raise, and I've been able to gain more leadership opportunities and represent our team in other cross-departmental meetings, which feels really good.

And with that, my boss told me, I have three other team members that have been there for five-plus years, and none of them had asked for a raise, or asked for a promotion — and of course right as I got one, someone else wanted to get one as well. And they're deserving, right? But the moral of the story is to advocate for yourself and be able to document what you're doing, so at my weekly one-on-one with my boss, I'm able to really show what I've done, what my priorities are, what the focus is — things like that. So be your own best friend and root for yourself.

Summary: Putting it All Together

Public Relations and Strategic Communication are part art, part science. They involve equal parts of strategy and creativity — and they're always changing.

Public Relations exists alongside Marketing and Advertising. The boundaries between each of these fields were once well-defined, but have eroded over time, thanks to social media and innovative technology. Strategic Communication emerged as an umbrella term that encompasses PR, and also includes elements that traditionally were in the domain of Marketing and Advertising. Nearly 100 years ago, practitioners called for an integration and closer alignment of PR, Marketing, and Advertising efforts, and recent technological advances encourage further blending.

The roles, expectations, and ideas of what it means to practice PR has always been in flux alongside changes in technology. As technological tools evolve, so do the ways to engage a specific audience. Changing roles for PR professionals leads to a demand for new skills and training for those roles.[30] Over time, the contours of PR and Strategic Communication are determined by these conditions.[31]

At the same time, the functional aim of Public Relations and Strategic Communication remains the same: To understand the context, and communicate the right message at the right time in the right place to the right audience.[32]

Media Attributions

- Image from page 103 of P.T. Barnum's 1890 book

Notes

1. There is disagreement as to when this occurred, with some estimates that it occurred as early as the 1840s. Here, 1860 is used, as Barnum indicated it occurred "circa 1860."
2. "How Barnum Drew a Crowd," (1927, June 29). The Great Divide, p. 17. Retrieved from: https://www.coloradohistoricnewspapers.org/?a=d&d=GRD19270629-01.2.138&e=-------en-20--1--img-txIN%7ctxCO%7ctxTA--------0------
3. Harlow, R.F. (1977). "Public relations definitions through the years," Public Relations Review, 3(1): 49-63.
4. From 1982-2012, PRSA relied on the following: "Public Relations helps an organization and its publics adapt mutually to each other." Retrieved from: https://www.prsa.org/about/all-about-pr
5. The two other "finalists" for a working definition of PR are as follows. First: "Public Relations is the management function of researching, engaging, communicating, and collaborating with stakeholders in an ethical manner to build mutually beneficial relationships and achieve results." Second: "Public Relations is the engagement between organizations and individuals to achieve mutual understanding and realize strategic goals." While you likely won't be asked to memorize these alternate definitions, they are useful to better understand how professionals view the work they do. Retrieved from: https://www.nevillehobson.com/2012/01/15/three-candidates-for-new-pr-definition/
6. "Learn about Public Relations," PRSSA, retrieved from: https://www.prsa.org/prssa/about-prssa/learn-about-pr.
7. Ibid.
8. As mentioned in Endnote #5, one of the definitions refers to PR as a "management function." PRSA avoided that term due to its "top-down" implications, instead describing PR as a "process." For more, see: Lamme, M.O. & Russell, K.M. (2016). Theorizing public relations history: The roles of strategic intent and human agency, Public Relations Review, 42: p. 742.
9. Smith, R.D. (2017). Strategic Planning for Public Relations. Routledge: New York. Page 63.
10. Marsh, C., Guth, D.W., Short, B.P. (2012). Strategic Writing: Multimedia writing for Public Relations, Advertising, and more, 3rd ed., Routledge: New York. Page 41.
11. Tilson, D.J. (2016). "From the natural world to artificial intelligence: Public relations as covenantal stewardship," pp. 206-221 in The moral compass of Public Relations, B.R. Brunner (ed.). Taylor & Francis: New York.
12. Grunig & Hunt (1984) were the first academics to mention "publics." They added a fourth public, "non-publics" that referred to potential groups who are not affected by a situation (and are at a stage prior to latent publics). They also use the term "conscious" rather than "aware" publics.
13. Some observers also include "nonpublics" in this list of Latent, Aware, and Active—but for the sake of simplicity, it's omitted here & included under "Latent."
14. Rawlins, B.L. (2006). "Prioritizing Stakeholders for Public Relations," Institute for Public Relations.

15. Grunig, J.E. & Repper, F.C. (1002). "Strategic Management, Publics, and Issues," Pages 117-`157 in J.E. Grunig (Ed.), Excellence in Public Relations and Communication Management, Lawrence Erlbaum Associates: Hillsdale, NJ. Page 128.
16. "Definitions of Marketing," American Marketing Association, Retrieved from: https://www.ama.org/the-definition-of-marketing-what-is-marketing/
17. "Advertising," American Marketing Association. Retrieved from: https://www.ama.org/topics/advertising/
18. Jenkins, H. (2008). Convergence Culture; Where Old and New Media Collide. NYU Press: New York.
19. Falkheimer, J. & Heide, M. (2018). Strategic Communication: An Introduction. Routledge: New York. Page 68.
20. Edelman, R. (2014, June 26). Storytelling @ the speed of now. 2014 Academic Summit. Speech given at DePaul University, Chicago. Cited in Wilson, L., Ogden, J., & Wilson, C. (2019). Strategic Communications for PR, Social Media and Marketing, 7th ed., Kendall Hunt: Dubuque, IA.
21. Stevens, A. (1996). "Public relations in the year 2000," Public Relations Quarterly, 41(2): 19-22.
22. Percy, L. (2008). Strategic integrated marketing communications. Routledge.
23. See Hallahan, K., Holtzhausen, D., Van Ruler, B., Verčič, D., & Sriramesh, K. (2007). Defining strategic communication. International journal of strategic communication, 1(1), 3-35. See also Zerfass, A., Verčič, D., Nothhaft, H., & Werder, K. P. (2020). Strategic communication: Defining the field and its contribution to research and practice. In Future directions of strategic communication (pp. 159-177). Routledge. Note: Hallahan et al., define strategic communication as "the purposeful use of communication by an organization to fulfill its mission," and Zerfass et al., build on that definition with the following: "the purposeful use of communication by an entity to engage in conversations of strategic importance to its goals."
24. Chadwick, A. (2017) The hybrid media system: Politics and power. Oxford University Press.
25. Zimand-Sheiner, D. and T. Lahav (2022). "Plain old Bess in a different dress? Disruptions of public relations in the digital age," Public Relations Review, 48: 1-8.
26. Bernhard, J. and U. Russmann (2023). "Digitalization in public relations—Changing competencies: A longitudinal analysis of skills required in PR job ads," Public Relations Review, 49.
27. Santa Soriano, A., & Valdés, R. M. T. (2021). "Engaging universe 4.0: The case for forming a public relations-strategic intelligence hybrid," Public Relations Review, 47(2): 1-12.
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31. Bernhard, J. and U. Russmann (2023). "Digitalization in public relations—Changing competencies: A longitudinal analysis of skills required in PR job ads," Public Relations Review, 49: 1-12.
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2.

HISTORY: HOW WE GOT HERE & WHERE IDEAS COME FROM

Nathan J. Rodriguez, Ph.D.

"The past is never dead. It's not even past."
—William Faulkner, Requiem for a Nun

"We need, in every community, a group of angelic troublemakers."
—Bayard Rustin

First, a Story…

The year is 1809.

Newspapers in New York are informed that famous Dutch historian Diedrich Knickerbocker has disappeared from the Columbia Hotel on Mulberry Street.

The notices to the newspapers characterize him as likely not in his right mind, and they say that newspapers would be "aiding the cause of humanity" by alerting the public.

Weeks passed, and Knickerbocker is still nowhere to be found. Some New York officials are concerned enough to offer a reward for his safe return.

Seth Handaside, the hotel's landlord, informs the same papers that a "very curious" book was found in Knickerbocker's room, "in his own handwriting," and that if Knickerbocker does not return to satisfy his debts, the manuscript will be published to recoup expenses.

The book, "A history of New-York from the beginning of the world to the end of the Dutch Dynasty," is then published amid much fanfare.

As it turned out, the famous Dutch historian named Knickerbocker did not exist, nor did the landlord named Handaside. Even the hotel and street name were fictional. The characters and manuscript were figments of 26-year-old Washington Irving's imagination.

Washington Irving, perhaps reminiscing about that one time he faked the death of a fictitious character. Image available in public domain, courtesy of Smithsonian National Portrait Gallery

Enough people at the time believed the story. And the attention from the fake news meant that Irving was able to launch his literary career. He would become the first American to write as a primary means of income, rather than a side gig — and it all began with what would charitably be described as a pseudo-event or publicity stunt.[1]

The Takeaway

Washington Irving wouldn't have thought of himself as a public relations practitioner, but through his actions, he would certainly be thought of as practicing public relations, or PR.

So, is Public Relations and Strategic Communication a profession or a set of actions?

We'll cover that and more over the next few pages.

For now, it's safe to say the history of PR extends further into the past than might be expected, filled with literal (and figurative) saints, revolutionaries and reformers, shameless self-promoters, and outright con artists.

We will learn about it and learn from it.

Introduction to the History of PR & Strategic Communication

Let's say you're out riding a bike one day.

Someone may say, "Oh, I didn't know you're a cyclist." and you might reply, "I'm just out riding my bike, but I wouldn't consider myself a cyclist."

There's a distinction between the act of riding a bike and being considered a cyclist.

Similarly, you can look through history and see examples of individuals who use public relations strategies and tactics, but who wouldn't consider themselves PR professionals. We can still learn from them.

To push the bicycle metaphor a little bit further, focusing only on official PR practitioners is akin to focusing only on participants in the Tour de France. It ignores the lessons we could learn from riders who commute through congested city streets and even some tricks from wildly inventive BMX riders who might inspire us.

This is a roundabout way of saying that we're not just going to examine PR professionals who chose to work for giant corporations and call that "PR history." There's a rich legacy of activists and social movements who worked from the same toolbox as PR practitioners, and they changed the course of history. Simply put, PR is both a profession and a practice that a whole range of people use.

What We'll Cover:

★ Pre-modern PR

★ Early years of PR in the U.S.

★ Advocacy & Social Movements

★ Barnum, Lee, Bernays & Fleischman

★ “Modern” PR: A State of Evolution

Pre-modern PR: “*A rose by any other name…*”

As mentioned in Chapter One, PR is “notoriously difficult to define, which makes it hard to pinpoint its origins.”[2] The truth is, we know very little about the history of Public Relations practices prior to the 20th century.

An exhaustive 83-page study of PR history before 1900 concluded that “the birth of Public Relations was not identified; there was no discernible starting point, founding date, or incubation period,” and also that “no area of Public Relations history has been adequately researched.”[3]

The basic function and purpose of Public Relations have remained the same throughout history — only the technological tools have changed. A view of the history of PR is only limited by someone’s interpretation of historical events.

It could certainly be argued that ancient monuments built several thousand years ago were attempts at strategic communication, providing a message to outsiders and attempting to unify the local population.

In that 83-page study, the authors, Lamme & Russell, contend that “the intentional practice of Public Relations is at least 2,000 years old.”[4] In a way, Public Relations has always been around, and it’s been called different names over time. The term Public Relations was being used by the press in the 1700s, and by the 1830s, the term was generally being used in the same context as it is today.[5]

There are five basic motivations for PR that surface across different times and industries: “**Profit**, including sales and fundraising; **Recruitment**, including customers, volunteers, converts and employees; **Legitimacy**, including individual and organizational; **Agitation**, meaning efforts designed to work against something or someone; and **Advocacy**, meaning efforts designed to work for something or someone.”[6]

If we use a relatively broad definition of Public Relations, we begin to see it throughout history — when Sparta emphasized its victories and downplayed its defeats during the Persian War in Ancient Greece, when Genghis Khan sent forth an advance team that “grossly exaggerated the size and cruelty of his armies,” or when Louis XIV unabashedly promoted and defended France.[7] The list of historical examples is limited only by the interpretation of events. For that reason, we’ll limit our overview to the U.S., and focus primarily on the past 100 years.

PR in the United States: The Early Years

Figures and foundational documents from the American Revolution are examples of Public Relations in action, as several strategies and tactics were developed with the goal of declaring independence and forming a new nation.

A wide range of documents from the founding of the U.S. may be considered "examples of the power of Public Relations."[8] Prior to the American Revolution, Thomas Paine outlined the unfair treatment of colonists by Great Britain by sending "The Crisis Papers" to colonial newspapers—often characterized as "a series of press releases."[9] Similarly, to help promote the value of the new American government, Alexander Hamilton, James Madison and John Jay wrote the Federalist Papers to support the Constitution. Some have even called this act "the greatest work ever done in America in the field of Public Relations."[10]

But perhaps the best example was Samuel Adams, who used more than 24 pseudonyms and wrote hundreds of essays attacking England, all intended to provoke crises to lead the colonies to break away from Britain. Adams used newspapers and pamphlets to encourage colonial Americans to engage in an insurrection. Through that work, historians would later consider him to be "the father of press agentry" and someone who was the "progenitor" of "today's public relations specialists."[11] It's been said that had Adams and others not relied on the "press, posters, speeches" and "symbolic gestures with the sustained saturation" that they did, the American Revolution might have never happened.[12]

Legends of the Old West

Some of the most well-known names related to westward expansion in the 18th and 19th centuries, including Daniel Boone and Buffalo Bill Cody, are famous for successful Public Relations efforts.

Daniel Boone was an actual person, but his myth was created in the 1780s. Boone and his business partners were land speculators, buying and selling tens of thousands of acres, and they wanted to sell land in Kentucky.[13] They wrote a guidebook for the state of Kentucky, which included a chapter on "The Adventures of Colonel Daniel Boone[e]."[14] The guidebook was a hit, and catapulted Boone into the status of one of the earliest folk heroes in the emerging United States of America. Within a year, copies of the text circulated throughout Europe, and Boone was celebrated as a symbol of the American spirit.[15]

The Works Progress Administration was created by FDR as part of his Second New Deal to help relieve some of the economic hardship brought on by the Great Depression. This mural, entitled, "Daniel Boone's Arrival in Kentucky," was created by Ward Lockwood as part of the WPA, and now hangs in the U.S. Post Office and U.S. Courthouse in Lexington, Kentucky. Image available in the Public Domain via https://www.loc.gov/pictures/item/2013634460/

In an unfortunate twist of fate following Boone's death, a range of individuals and organizations attempted to hijack his image to achieve their own ends, including groups who were antagonistic toward Native Americans. They attempted to redeploy Boone as someone who hated Native Americans, although he had developed enduring friendships with a number of Native Americans during his lifetime.[16]

William Frederick Cody would be better remembered as “Buffalo Bill.” He was also an actual person whose image was crafted in part by his own actions and in part by the actions of his press agent and another writer who loved a good story.

Ned Buntline was that writer. He originally wanted to write a novel about Wild Bill Hickock and tried to pitch Hickock on the idea. That didn’t go well. As legend has it, Wild Bill pulled out a gun and told Buntline to leave town.[17] It’s believed that Buntline continued to interview Hickock’s friends and, after meeting William Cody, decided that Cody might make for an even better story. Buntline claimed credit for the “Buffalo Bill” nickname, saying he created it for the series he was writing for *New York Weekly* entitled “Buffalo Bill, the King of the Border Men.”[18]

The life, myth and legend of Buffalo Bill are entwined due to the ambition of his press agent and members of the press, who helped craft his image. This portrait was created in the late 1880s when William Cody had just turned 40. Image available in the Public Domain via https://www.loc.gov/item/99401036/

Cody's press agent, John Burke, also helped to "spread Cody's fame by turning out stories, providing interviews, and inventing new myths."[19] Burke also published a massive 750+ page book that linked the near-mythical figures of Daniel Boone, Davy Crockett, and Kit Carson with Buffalo Bill Cody.[20]

Advocacy & Social Movements

At this point, we've covered the spectrum of motivations — profit, recruitment, legitimacy, agitation and advocacy — and it should be clear that these motivations can and do overlap.

Scholars have identified the 1840s as a period when activists began to strategically use emotional appeals to persuade audiences.[21] The first women's rights convention, held at Seneca Falls in 1848, was organized by women who each had experience in the abolition movement and "expertise in the strategies and tactics of public opinion campaigns."[22]

A few decades later, Clara Barton, first known as "The Angel of the Battlefield" during the Civil War, established the American National Red Cross. She employed an array of tactics: "letters, speeches, items for the press, handbills, congressional visits, and an eight-page pamphlet."[23] Her efforts were further amplified by four journalists who were charter members of the organization, three of whom wrote for the Associated Press.[24]

Our final example of Public Relations advocacy is conservationist John Muir. He lived in Yosemite from 1868-1874, fell in love with the beauty of the area, and originally wanted to protect it from being damaged by livestock.[25] He teamed up with editor Robert Underwood Johnson, and they successfully lobbied Congress to create Yosemite National Park in 1890.[26] Two years later, he co-founded the Sierra Club, and his efforts in writing scientific articles for magazines, penning hundreds of letters, and lecturing across the nation led to the creation of Sequoia National Park and the Grand Canyon.[27]

PT Barnum & Press Agentry

In those same decades — the 1840s through the 1880s — emerged one of the first business persons in the U.S. to use PR tactics to generate profit: Phineas Taylor Barnum, better known as PT Barnum.[28]

He's widely quoted as saying, "There's a sucker born every minute," but that phrase was actually something said about Barnum, not *by* him.[29] Barnum owned a museum in New York City filled with "human curiosities" and took the show on the road, calling it "PT Barnum's Grand Traveling American Museum," about 20 years prior to Barnum & Bailey's Circus.[30]

In his early days, Barnum sometimes bribed editors for newspaper coverage[31] — usually around $20-$40, equal to about $1,000 in 2024 currency. He eventually became a source of fascination on his own accord. His name was synonymous with "showmanship." More than 82 million people visited his New York museum, and throughout his lifetime he entertained a range of celebrities and politicians, including Mark Twain, Abraham Lincoln and Queen Victoria.[32]

Barnum later became involved in politics and agitated against racial discrimination and prostitution,[33] while also advocating for recognizing Black men and women as citizens in the U.S.[34] At the same time, he admitted having owned and even whipped enslaved people when he lived in the south. He lamented, “I ought to have been whipped a thousand times for this myself.[35] It may be argued that Barnum deserves credit for both philanthropic work and political advocacy late in life,[36] but his legacy is complicated at best. At the very least, he was a product of his time and place and among the first — but far from the last — to generate publicity by any means necessary.

Railroads & the Professionalization of PR

Public Relations and Strategic Communication may be viewed as a set of actions or a distinct profession.

Thus far, we’ve looked at historical precursors — actions — that have used PR strategies and tactics. In the mid- to late-1800s, there finally emerged a professional industry around the idea of Public Relations. If we adopt a strict view of PR as a professional occupation, then the railroad industry was perhaps the first to have PR practitioners on its payroll.

In the 1850s, railroad companies “led the way with paid agents” to steer public opinion in their favor.[37] They connected with journalists and politicians from local communities, provided free tickets to opinion leaders, and organized field trips for clergy and teachers.[38] Some wealthy patrons were even taken on a buffalo hunt with Buffalo Bill.[39] By the 1880s, amid westward expansion, the railroad companies employed around 30 to 40 in-house PR experts and were thus at the forefront of Public Relations professionals serving business interests.[40]

By the 1890s, some journalists had changed professions and went into Public Relations, marking the beginning of a tenuous relationship between journalists and PR practitioners.[41] One of the central figures in the early days of PR had connections to both the railroad industry and journalism: Ivy Lee.

Muckraking

Journalism and Public Relations are two sides of the same coin. The Muckraking era of journalism, from the 1890s-1920s, was a high point for investigative writing designed to change society. Though “muckraking” was intended to be a derogatory term for reporters who exposed corruption in big business, those reporters embraced the term as a badge of honor.[42]

People like Ida Tarbell took on Standard Oil, while Upton Sinclair’s “The Jungle” exposed conditions in the meatpacking industry, and Nellie Bly went undercover to report about patient abuse in mental hospitals. At the time, such stories were viewed as “publicity” regarding those entities. Businesses thus began to view their own efforts at publicity and Public Relations as something more than just promotion: They could use PR to defend themselves.

As historians put it, “…what really prompted the birth of contemporary public relations…was the reaction against the muckrakers with their new power to communicate with the masses…If publicity was being used to effectively attack business, why could it not be used equally well to explain and defend business?”[43]

Ivy Lee

A central figure in the birth of “modern PR” is “Poison” Ivy Lee[44], a former journalist for The New York Times, whose first client as a PR practitioner was the Pennsylvania Railroad. His predisposition toward transparency is reflected in his advice to “tell the truth because sooner or later the public will find out anyway.”

Lee is credited with writing the first corporate news release in 1906, which didn’t promote a business but detailed a train wreck in Atlantic City, New Jersey that killed more than 50 people. As PR counsel, Lee advised the railroad to provide reporters with rides to the scene of the accident.

Lee’s advice was in stark contrast to the prevailing practice at the time, which would have been to conceal some of the most tragic facts of the accident. The New York Times, and other outlets ran his news release verbatim, while also praising the railroad for its transparency.[45]

For all his contributions, however, Lee is not without fault. He represented the Rockefellers, a prominent oil tycoon family. He also defended mining companies by deploying factually inaccurate information during the 1913-1914 Colorado Coal Strike, which included the Ludlow Massacre. During this massacre, an anti-strike militia killed more than 20 people.[46] Lee would later go on to meet with Mussolini and Hitler several years before the start of World War II, and he would be interrogated by the House Un-American Activities Committee in May 1934 about his connections to Nazi Germany and anti-American propaganda.[47] He died later that year.

Lee preferred to call himself a “publicist” rather than a press agent. He felt that press agents (like P.T. Barnum, for example) had a negative reputation, and that a publicist was simply someone acting transparently on behalf of an organization. Historians at the time referred to him as “the first great figure” in the field and the “prototype of subsequent Public Relations counsels.”[48]

Fleischman & Bernays

Ivy Lee once told Edward Bernays that what Lee did was "art" and that it would die with him.[49] Public Relations and Strategic Communication is part art and part science. Bernays would bring the science to the field.

Doris Fleischman and Bernays were childhood friends who went on to marry, and are often credited with "founding" what's referred to as "modern PR." More accurately, Bernays typically receives a disproportionate amount of credit, while Fleischman's contributions are barely mentioned.[50] Together, they were a formidable duo in the development of modern PR.

Bernays was a nephew of Sigmund Freud and incorporated a social science approach to the practice of Public Relations. He began as a music promoter and joined the United States Committee on Public Information during World War I, where he attempted to rally support for the Allied war effort. Bernays referred to his wartime work as "psychological warfare," and he developed a new appreciation for the power of persuasion.[51] Following the war, he set out to apply what he learned within the world of business because, in his own words, "what could be done for a nation at war could be done for organizations and people in a nation at peace."[52]

When Bernays opened his own PR firm in 1919, his first hire was Fleischman. Fleischman was a talented writer and editor. She wrote most of the news releases, articles, letters, and speeches sent out by Bernays and the firm.[53] Bernays and Fleishman marred three years later. He credited Fleischman with coining the term "Public Relations," though scholars pushed back on that assertion, pointing out its usage by the railroad industry as early as 1897.[54]

Bernays is credited with writing what is widely considered to be the seminal text in Public Relations, *Crystallizing Public Opinion*, in 1923. The book is largely a collection of stories of the work Bernays did for his clients. The book was also an exercise in PR for the industry of PR: He wanted to move the entire field from the popular conception that PR was just for "circus promoters and publicity agents."[55]

Torches of Freedom

In the late 1920s, women accounted for just one in eight cigarette purchases. The American Tobacco Company paid Bernays $25,000 — nearly half a million dollars today — to help convince more women to smoke.

Bernays rolled out a few ideas, first hiring an influencer — a well-known ballroom dancer, Arthur Murray, who encouraged people to reach for a cigarette when they felt "tempted to overindulge at the punch bowl or the buffet."[56] The campaign worked, but women primarily smoked in private spaces, with the stereotype (reinforced in movies) that only devious women without morals would smoke in public. Bernays sought to recast cigarettes as a form of women's liberation — as "Torches of Freedom."

During the Easter Day Parade in 1929, a young woman named Bertha Hunt (Bernays' secretary) stepped onto 5th Avenue in New York and created a scene by lighting a Lucky Strike cigarette. The press had been alerted to this defiant act in advance and were there to cover it as Hunt walked down the street with 10 of her friends. *The New York Times* ran a story the following day: "Group of Girls Puff at Cigarettes as a Gesture of 'Freedom,'" and dozens of other newspaper outlets picked up the story. Some refer to Torches of Freedom as the "first" PR Campaign.

P.S.: Bernays loved the lore around Torches of Freedom and was never one to shy away from burnishing his legacy. It's been said, -"The legend of that Easter Day parade grew each time Bernays told the story, and even though cigarette sales increased and Bernays maintained a relationship with the client for several years … the actual coverage was a bit more muted, dispersed and nuanced."[57] And for the record, Bernays was said to personally oppose smoking, and tried to get Fleishman to quit. Their daughter claimed he would "snap them in half and throw them in the toilet."[58]

It's difficult, and perhaps unnecessary, to disentangle the work of Bernays and Fleischman. The key is that when the accomplishments of Bernays are discussed, remember Fleischman was likely the person doing much of the heavy lifting behind the scenes.

To help promote PR as a positive, Bernays often tried to contrast it from propaganda. He claimed the difference between propaganda and education was in perspective. "The advocacy of what we believe in is education," he said. "The advocacy of what we don't believe is propaganda."[59] That comment provided a bit of an intellectual smokescreen for ideas and campaigns that would broadly be considered objectionable practices today.

In recent years, it's been observed that he "repeatedly demonstrated that he regarded truth as liquid,"[60] and that there is a "contradiction between what Bernays said concerning the ethical behavior of a public relations counsel and what he did himself."[61] In other words, while Bernays sought to create an aura of respectability for the profession, he didn't behave as though those rules applied to his own work. It was a case of "do as I say, not as I do."

The next chapter features a more detailed discussion of ethics, so in the meantime, a brief look at some darker moments in PR history will serve as cautionary tales.

Post-World War II: PR goes Bananas

But wait—there's more bad stuff we need to discuss!

Public Relations practitioners have been involved in some shady dealings through the years. A timeline of "terrible moments in human history" from the last half of the 20th century isn't fruitful because — whether through their own actions or those of professional practitioners — bad actors have relied on PR in their moment of crisis or anticipation of that moment.

Another Bernays-involved event concerns Chiquita bananas, known as United Fruit Company in the 1950s. Guatemala, Costa Rica, and other countries in the region were sometimes referred to as "banana republics" due to how much control the fruit companies exerted over the government and local population. In essence, United Fruit bribed Guatemalan government officials in the early 1900s, to lock in a deal that meant the fruit companies paid virtually no taxes and provided pennies a day to local laborers.[62] Colonel Jacobo Arbenz was democratically elected in 1951 by a 2-1 margin and began returning undeveloped land to farmers. At the time he was elected, just 2% of the population owned 70% of the land, and 90% of Guatemalan citizens were landless farmers.[63] Arbenz paid United Fruit what the company claimed the land was worth on their taxes (which the company had grossly undervalued), and a year later Arbenz transferred more than 200,000 acres to local workers and farmers.[64]

United Fruit hired Edward Bernays to help fix its Guatemala problem. This was the height of the "Red Scare" in the U.S., a time when Joseph McCarthy alleged the U.S. was being subverted from within by communist spies. Bernays used the U.S. media to spread stories that Arbenz was a communist and was taking orders from the Soviet Union.[65] It created a political frenzy. President Dwight D. Eisenhower didn't want to take direct action, so he ordered the CIA (established just a half dozen years earlier) to recruit an opposition force to overthrow Arbenz. In June 1954, the CIA participated in and led the military coup. Arbenz fled the country and resigned from office ten days later. The new military dictatorship led to a civil war in Guatemala from 1960-1996 and an estimated 200,000 deaths.[66]

It's too reductive to blame Bernays. United Fruit had a number of ties to influential figures in the U.S. government, but there's no doubt he played a significant role in changing public perception. "... Most analysts agree that United Fruit was the most important force in toppling Arbenz, and Bernays was the company's most effective propagandist."[67]

Any chapter about history is a battle between depth and breadth.

Entire books have been devoted to the documented role of Public Relations in promoting the sugar industry.[68] In the mid-1970s, the PRSA awarded the U.S. Sugar Association with the prestigious Silver Anvil Award for its crisis communication campaign to limit FDA regulation of sugar.[69]

Then there's the issue of Big Tobacco marketing to children and lying about the nicotine addiction in cigarettes, for which PR firms "helped to obfuscate or deflect the health question."[70] And there's also the fossil fuel industry funding campaigns to undermine science regarding climate change.[71] The list, unfortunately, goes on and on. The old adage that "history is just one damn thing after another" holds true.[72]

If you're considering PR and Strategic Communication as a career, this hasn't been the world's best pep talk. But it's important to understand that PR's negative reputation is rooted in some questionable campaigns and practices. There's no shortage of humans who will engage in dishonest acts for a few more dollars. And that's why we need to take the concept of ethical behavior seriously. Our choices have implications for local communities across the globe.

PR & The Civil Rights Movement

Effective PR is essential to the success of any social movement.[73], [74]

Martin Luther King, Jr. was keenly aware of the importance of Public Relations and Strategic Communication.

As he put it, "Public relations is a very necessary part of any protest of civil disobedience…The public at large must be aware of the inequities involved in such a system [of segregation]. In effect, in the absence of justice in the…courts…nonviolent protesters are asking for a hearing in the court of world opinion."[75]

Working with King was a lesser-known figure, who helped form strategic alliances, build relationships with key stakeholders, and coordinate events like the March on Washington from behind the scenes: Bayard Rustin. In 2023, Netflix released a documentary, Rustin, which presents a fuller picture of his life, but click below for a brief overview of his contributions to the movement:

TED-Ed: An unsung hero of the civil rights movement – Christina Greer

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://uen.pressbooks.pub/stratcomm/?p=132#oembed-1

What were examples of PR strategies and tactics employed by Rustin?

Experts Talk Back:

Three questions with Dr. Karen Miller Russell, Jim Kennedy Professor of New Media at the University of Georgia. Dr. Russell is a prolific scholar whose work focuses primarily on the history of Public Relations.

Q: You've written obviously a lot about PR history and contributed quite a bit to that body of literature. I've seen a distinction of PR as a set of actions versus PR as a profession. I'm curious if you think that's a fair distinction?

I think there is a distinction because I think there's PR as an industry that has corporations and trade associations and trade press. And then there's people just doing the activities that are all under the PR umbrella, but they're not part of an industry.

They're just probably working for a social movement or something that does not have that formal structure, but they're still doing strategic things to communicate and achieve goals and all those kinds of things.

I think they both belong. I think they should both be included, but I do think there's a difference.

Q: Just glancing through some PR history chapters in a lot of textbooks, students can be forgiven for believing Edward Bernays just fell from the sky one day and PR was born. I can't stomach the idea that Bernays is the person who started all this because then you point to Doris Fleischman and Ivy Lee, and that's just on the corporate side of things as well.

So, I do have some questions about Doris Fleischman and am curious to get your take on her contributions because I found it difficult to disentangle her work with Edward Bernays … She clearly deserves more credit than she's been given in a lot of instances, but does she also deserve a little bit of blame for some of those more negative things Bernays did? How do you consider her contributions and overall legacy to the field?

That is so hard, because we don't actually know what happened behind closed doors. We don't know what she said or didn't say, so what I've tried to do is say things like "The Bernays Agency" or "Bernays and Fleischman," because you obviously can't say "Oh, she did all the good parts behind the scenes, and he was the horrible one." That's not fair to either one of them...

I don't like Bernays, so I'm not an expert in Bernays at all. And so I've tried to include what you have to, and — whatever. His daughter — that's a complicated thing — I was on a panel with her one time and she really doesn't like Bernays — her dad — at all. And I think that colors what she says about her mom, too. Take all of that with a grain of salt.

So I've just always tried to minimize them, and maybe I'm going too far the other way. But he's been given so much credit! So in my AT&T book, I go back and their first publicity guy was in 1886 — so you cannot say that Bernays is the father of public relations. You can't even say Ivy Lee is the father of public relations. So I always say PR has many parents. And that kind of points out how stupid it is to call it a father or a parent to begin with. No other professions have parents.

My take on early PR is that there were a lot of people experimenting and trying things from the 1880s to the 1900s. And then Ivy Lee formalized the agency structure, but there was also a lot of formalizing going on on the corporate side. So AT&T's first information department was in 1905, which is the same time as Ivy Lee, so he's clearly not the father either.

In the 19th century, people were not trying to create a profession, they were trying to solve a problem. And the problems were different depending on if you were an agency or a corporation or nonprofit or what have you. But they developed a lot of tactics and strategies, and then people come along and go, "Oh we can apply this."

So by the time Bernays and Fleischman come along — it's not new; sorry.

In fact, this week, I worked with Shelley Spector at the PR museum, and we've come up with several other people who were ahead of Bernays and Fleischman, including a husband and wife team: Zelda and Louis Popkin. He went by "Pop," so "Pop Popkins." So the husband and wife thing wasn't new. And clearly what they did was just more publicity oriented, and what Bernays did was not — it was more strategic. But so was Ivy Lee, and so was my guy at AT&T — so I guess that's why I minimize Bernays. I think he just took what everybody was doing and made a big splash about it and got all the attention.

Q: Lastly, what do you think PR students could learn from studying these case studies and history, and what advice would you have for students who are graduating in the next few years as they enter the PR and Strategic Communication field overall?

One thing you can learn from PR history is that it doesn't stay the same. It's constantly changing. And the people who don't keep up, don't keep up.

So it's lifelong learning. It's not like you finished school and now you're done and you can do your PR career for the next 30 years based on what you know — that's not it. There's constant change and constant learning and paying attention to what other people are doing.

Just like the cases from history. What can I learn that's good and bad from this, and recognizing that there's both good and bad. There's effective, and then there's ethical — and those aren't always the same. So applying a lot of the lessons from history can teach you what to do going forward.

The Study of Public Relations

The first class in PR was offered by Bernays at New York University in 1923, Following suit, other universities first began to offer courses in PR during the 1940s, which became more widespread over the next few decades.[76] PR as an official peer-reviewed academic discipline began in 1975 when the first academic journal for the study of PR, *Public Relations Review*, was founded.

Despite efforts to turn the practice of PR into a profession, as late as 1980, very few practitioners relied on PR theories or research in their work.[77] To be fair, they didn't have much in terms of theories or research until the 1980s when academic journals "came alive,"[78] but even then, relevant theories were generally scattered across different areas of study, ranging from rhetoric, opinion formation, and mass communication to social psychology.[79]

In the late 20th century, there were functional differences between Public Relations, Advertising, and Marketing. Beginning in the 1990s, the internet and social media blurred those boundaries. We can make academic distinctions, but there is less of a functional difference in the fields. As one researcher put it, "PR 1.0" was more "top-down" in nature, focusing on news releases, managing accounts, and standard pitching, while "PR 2.0" is more "bottom-up," with experts listening to consumers, creating content and stories, engaging with the community, and working with influencers and content creators.[80]

Strategic Communication is a more recent umbrella term that includes PR and is "transboundary," broadly directed at using communication toward a specific end.[81] In a way, Strategic Communication is a return to the roots of PR and what Bernays envisioned Public Relations to be: an endeavor to interpret publics for a client and interpret the client for publics. It draws upon a wide range of ideas and tactics to do so.[82]

Summary: Putting it All Together

Public Relations may be viewed as a set of actions and a profession. Throughout history, Public Relations strategies and tactics have been used for the purposes of Profit, Recruitment, Legitimacy, Agitation and Advocacy.

There isn't a precise starting point for the professionalization of Public Relations, still Lee and Bernays are often cited as the two key figures to mark the beginning of "modern" PR. Lee was more well-known in his day.[83] He introduced the idea of transparency with information and prioritized relationships with publics, from trading partners, employees, industry, the government, and local and global communities. He believed in using every means necessary — ranging from newspapers to "the radio, the moving picture, magazine articles, speeches, books, mass meetings, brass bands."[84]

Lee was about 15 years older than Bernays and died in the 1930s, while Bernays lived to the age of 103 and passed away in 1995. Consequently, Bernays cemented his legacy as an industry leader, and he and Fleishman were able to refine their theory and practice of Public Relations of several decades and the height of mass communication.

Public Relations has a complicated history, and there have been attempts to distance present practice from the days of circus promotions, hoaxes, and propaganda. To be sure, the practice of PR has become "generally more sophisticated and ethical as time goes on."[85] But it's also critical to note that public relations strategies and tactics can mobilize communities and improve people's lives, as we saw in examples ranging from organizing for women's rights to forming the Red Cross and developing national parks.

In the 20th century, so-called "modern PR" was only referred to as "modern" because it "grew in concert with technological advances…and emerged from that landscape."[86] The goals and objectives of Profit, Recruitment, Legitimacy, Agitation and Advocacy have remained the same for hundreds of years. Only the technological tools in our toolbox have changed.

Public Relations tactics and tools can create memorable, meaningful experiences and lasting change, but in the wrong hands, they can cause anything from temporary distress to destruction and death. This chapter reviewed some dark moments in history and provided examples of what not to do. The next chapter offers a guide to the ethical practice of public relations and strategic communication.

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3.

ETHICS & CORPORATE SOCIAL RESPONSIBILITY

Nathan J. Rodriguez, Ph.D.

"Tell the truth, because sooner or later the public will find it out anyway. And if the public doesn't like what you are doing, change your policies and bring them into line with what the people want."[1]
—Ivy Lee's advice to John D. Rockefeller, Jr. in 1914

First, a Story...

We're in ancient Greece. Socrates, a philosopher who counts Plato among his students, stands before an audience in the agora or public square.

Socrates fields a question from Glaucon, Plato's older brother.

Glaucon presents the philosopher with a scenario: Two rings are given to two people. Each ring has the same power and renders the wearer invisible. The ring allows the wearer to indulge in their appetites and fantasies — and get away with it. The ring wearer would have as pristine a reputation as someone who moderated their behavior.

Glaucon asks Socrates — *paraphrasing for brevity and modernity's sake* — "Why would someone be good for the sake of being good? If you could cheat and get ahead without fear of punishment, why wouldn't you? Isn't the person who wore the ring and didn't use its power a total chump?"

Glaucon clearly believes even the most upstanding citizen would behave unjustly if they owned such a ring.

Socrates corrects Glaucon, stating that he is only partially correct. People tend to act for their self-interest. Rational people don't intentionally make decisions to harm themselves or others. But — and here's the key — ideas about ethics and morality aren't lists of laws to prevent people from enjoying life. A code of ethics provides a guide to living a good life.

The Takeaway

The idea of leading and living a good life is especially important in the world of Public Relations. As we saw through the history of Public Relations, there are many examples where practitioners veered away from the truth or public good. As such, ethics should be at the forefront of good Public Relations practices.

Our lives evolve from the results of our decisions. In the world of PR, some of the best-paying clients may ask you to defend or campaign on behalf of a multinational corporation seeking to maximize profit while destroying the planet. Or you could be asked to defend a politician who has done something both illegal and immoral. Choose wisely. Use your skills for good, and you'll wind up living a happier, more fulfilling life.

You'll ultimately decide how to spend your time. The hollow sense you have while grinding away for a paycheck is markedly different from the feeling you get advocating for something personally important to you. It barely feels like work. There's nothing quite like knowing you're making a difference – for good.

This chapter lends a few philosophical arrows to have in your quiver when the going gets tough.

What We'll Cover:

Ethics, Morals & Laws

The terms "ethics" and "morals" are often used interchangeably, and they can overlap in some cases. However, there are a few important distinctions. A quick point of difference is that "ethics are the rules of conduct provided by an external society, group, or organization," while "morals are personal, your individual guide to what is right and wrong."[2] It gets a little messier from there, if we consider different "levels" of ethics that range from international and societal to professional, organizational, and personal. For our purposes here, we'll rely on ethics as our catch-all term, because we're acting in a professional capacity.

Ethics and morals are different from laws. Laws formalize the ethics and morals of a community into legal codes that incentivize and punish certain behaviors. However, laws cannot always account for the nuances of personal and public behaviors.

"You can be unethical and still be legal," Meta CEO Mark Zuckerberg once messaged his friend. "That's the way I live my life."[3]

To be clear, self-serving philosophies like Zuckerberg's essentially ignore the notion of ethical principles or a moral compass. The goals are to avoid breaking the law and paying the consequences. It's a safe bet that Zuckerberg would have taken full advantage of the "Ring of Gyges" in our opening anecdote. However, as Socrates pointed out, having a strong sense of personal and professional ethics may be the more productive path to living a good life.

To sum up a valuable lesson from an ancient Greek philosopher: Do better.

Or, as the Association of National Advertisers put it: "Go beyond what's legal — do what's right."[4]

A final word on the role of ethics, morals and laws in the field of Public Relations. In the U.S., every person has the right to be represented by counsel, which means that public defenders often may be "forced" to defend a client whose actions they despise. Public Relations is not The Law. You shouldn't ever feel compelled to work on behalf of any client, and if you are — walk away. You'll feel better about yourself.

We'll get around to discussing some hefty ethical issues by the end of the chapter, but first things first: Let's keep you gainfully employed and not in prison.

PR, Strategic Communication & the Law

Practitioners work with words and images. There are laws pertaining to the use of those words and images in different contexts. Perhaps you'll work at an organization that has an attorney on retainer or even has in-house counsel — and perhaps not. The laws still apply to your actions.

A caveat: Social media is a fast-paced arena, which lends itself to making rapid decisions. There's no excuse for breaking the law or steering from your personal set of ethics, no matter how rushed you are.

Attribution is giving credit to the original author of content. This is particularly important when it comes to running online contests, as you may find yourself eliciting, sharing, and repurposing content.[5]

A **User-Generated Content Policy** is a set of standards regarding the use, sharing, and repurposing of content created by users and fans. The policy should include providing credit for the content, as well as letting people know they'll receive attribution. It's vital to convey to all users that their participation and content will be used by the brand.[6]

Similarly, if you are creating a newsletter, email, or blog post — for example — you might include ideas or direct quotes from another source. When you do, you must provide attribution. Every single time.

The same goes for the images: They are legally protected by copyright laws. **Copyright** is a form of intellectual property law that protects original works of authorship, and it exists from the moment a work is created.[7] The **Digital Millennium Copyright Act**, or DMCA, extended U.S. copyright law to apply to online spaces.

Generative AI

The emergence and use of Generative Artificial Intelligence (GAI) tools such as ChatGPT, Microsoft Copilot, and DALL-E pose a range of legal and ethical issues.

Legally, communication executives have expressed concerns regarding copyright infringement, breaches of confidentiality, and data security. There are ethical and reputational issues as well, including the authenticity and accuracy of the material produced by GAI.

At this point, there remains some debate regarding the requirement to disclose content created with the assistance of GAI tools. The best arguments favor disclosure, to be transparent and demonstrate honesty and respect. That's how to build trust.[8]

There is such a thing as **Fair Use**, which is the concept that in certain instances, some copyrighted material can be used without express written permission.

Fair Use includes four basic considerations. First, is the use for commercial or educational purposes? Second, to what extent is the copyrighted work creative in nature? Third, how much, or what amount, of the original material was used? And fourth, how does this use affect the potential value of the work?[9] The notion of fair use is interpreted and determined on a case-by-case basis.

Images that are in the **Public Domain** are generally free to use, as the original copyright protection may have expired, as recently happened in the case of Steamboat Willie, an early iteration of Mickey Mouse.

The word "generally" does a lot of heavy lifting in the previous sentence, as it's worth mentioning that Disney still retains some legal rights as well.[10] Some authors and illustrators have chosen to make their work publicly available via Creative Commons. **Creative Commons** works within copyright law, and allows the original author to specify how their work may be reused. In many cases, attribution is all that's required. Some authors and illustrators choose to place limits on whether their creation may be "remixed" or whether it may only be used for non-commercial purposes. There are billions of CC-licensed works available for use, accessible through basic search engines, including Google, Google Images, and YouTube. Because there are different types of CC licenses, it's your responsibility to confirm the work is acceptable to use in a specific context.

Another caveat: **This is not legal advice**. Each of the terms mentioned have been discussed thousands of times in far greater detail than what we've done here — and there are complicated cases behind the simple definitions. This is just a brief introduction to key areas if you plan to use information, images or words created by someone else.

Speech, Privacy & the Law

With the very nature of Public Relations being — well, *public* — it's worth pointing out that not everything needs to be public. No, we're not saying you should cover up scandals for clients. Instead, remember that some information is private or proprietary and disclosing it could be illegal.

Common examples of internal communication include emails, memoranda, and newsletters. This information has limited First Amendment protection, because notions of "newsworthiness" and "public interest" do not apply as they would for media outlets.[11]

Be careful when creating content for internal newsletters — most legal action related to employee communications stems from sharing stories that disclose personal or private information. Always consider if telling the story or sharing a photo could cause someone embarrassment. Keep in mind: The "getting to know" or "kudos" stories should be submitted by employees to avoid oversharing or embarrassment.[12]

Defamation is false information that could cause an average, reasonable person to believe that someone's reputation is damaged. Defamation can occur in both internal and external communication. Language that is negative and harmful, published or communicated to a third party, and is to "some degree" the fault of "the person or organization making the statement in the first place"[13] — all fall under the defamation definition.

That "third party" could be the general public or a single person. Defamation is an umbrella term that includes defamatory statements that are spoken, referred to as **slander**, and defamatory statements that are in writing, known as **libel**. In the past, libel was considered more severe because the written word persisted longer than speech, but radio and television proved slander could be just as harmful. The internet "further erodes the distinction" between libel and slander, as "words, moving images and sounds can reach millions through the web, where they can remain almost indefinitely."[14]

In a defamation suit, the plaintiff — the person bringing the legal action — has to prove: that defamatory communication occurred, would likely harm the plaintiff's reputation in the community; the communication is about the plaintiff, whether implicitly or explicitly; the communication reached at least one person other than the plaintiff. The plaintiff must also prove the communication is false; and must show evidence of some type of injury to their reputation or person. And finally, the plaintiff must prove that publishing the communication was done with negligence (for most people) or "actual malice" (for public officials and public figures). Note: "actual malice" means that the person doing the defaming knew the information was false and published it anyway.

Photo by Katrin Bolovtsova via Pexels.

> *"If you tell the truth, you don't have to remember anything."*
>
> —Mark Twain[15]

There are multiple defenses to a defamation suit, but the two most common for practitioners are truth and opinion. A statement might destroy someone else's reputation, but if it's true; it's not defamatory. The truth really does set you free. The truth is an absolute defense to any defamation suit.

Second, people and organizations have the right to their opinions. It doesn't necessarily mean you can first state "in my opinion…" and then legally say anything you want — context matters — but it can insulate people and organizations. If these standards sound vague and open to interpretation, it's because they are.

The vast majority of defamation suits are brought against reporters and media outlets, and the majority of those suits are won by the defendants.[16]

But lawsuits require legal representation, which costs money. Even bringing the suit can jeopardize the reputation of each of the parties involved — even those who prevail.

Hopefully defamation is a concept you're aware of rather than a situation you experience, but awareness is the first step in avoiding that situation entirely.

Free Speech, Publics & "Cancel Culture"

The right to free speech refers only to the government attempting to regulate speech. Organizations can reprimand or fire employees whose actions or online behavior are incompatible with the stated values of the organization. Publics can choose to punish, boycott or "cancel" individuals or companies for certain statements or actions.

The term **cancel culture** has emerged in recent years, with a negative connotation, to describe the singular or collective act of admonishing, boycotting, or actively protesting a person or entity that has transgressed a norm held by a public.[17] Like the term "woke," "cancel culture" is a charged term that rose to prominence in the early 2010s[18] and originated in left-leaning Black activist circles, only to be later used derisively by right-leaning activists.[19],[20]

At its core, cancel culture can be thought of as **consequence culture**[21] because it highlights how an audience can be empowered to revolt against a person or company when a cultural or social norm is deemed to have been crossed. The breadth and depth of this revolt depends on a range of factors, and we'll get to some of that in the Crisis Communication chapter. For now, though, consider these loaded terms as reasons to be mindful of how words and actions can be interpreted — and sometimes misinterpreted — by publics. The potential consequences for individuals and organizations can be dire. Consumers are accustomed to organizations acting responsibly, and will hold them accountable when they fall short.[22] Individuals and organizations may be endowed with the right to free speech, but active publics determine consequences of that speech.

Cancel culture is based in audience perception and can be a majority of publics or just a select few. For example, in 2023, Bud Light faced backlash by conservative publics after the company partnered with a trans social media influencer. In the following weeks, Bud Light's parent company, Anheuser-Busch, issued a series of controversial responses that created backlash from more liberal publics.[23] In the end, revenue at Anheuser-Bush's U.S. division fell by more than 13.5% by the end of 2023.[24]

Ethical Frameworks: The Seventh Generation & The

Long Now

The "**seventh generation**" is a belief originating from indigenous cultures.

"We cannot simply think of our survival; each new generation is responsible to ensure the survival of the seventh generation."[25] In many cases, the short-term benefits are obvious and tempting, while the long-term consequences are uncertain — and someone else's problem. A seventh-generation mindset emphasizes the notions of responsibility, stewardship, and accountability.

PR and Strategic Communication scholars have advocated a similar philosophical stance, in what's been referred to as "**The Long Now**." The argument is essentially that PR is characterized by thinking in the present, emphasizing quarterly profits, and engaging in damage control. Instead, identifying and emphasizing long-term goals and building enduring relationships is central to The Long Now, which encourages practitioners to think "hundreds of quarters ahead, not just one or two." The idea is that good decisions take time and require expertise. The Long Now envisions a "'good corporate citizen' that thinks in terms of satisfying networks of stakeholders — some of whom have nothing to offer the organization *today* — will make better, more ethical, civic choices and 'foster responsibility.'"[26]

Ethics & Moral Philosophy: Aristotle, Kant, Mill & Rawls

Most of this textbook prepares you for being a successful professional, rather than living the philosophical "good life." However, the two actually go hand-in-hand. And even though we just got through a list of "stuff you should avoid doing," ethics isn't simply another list of bad behaviors to avoid — it's the study of how we should live our lives. Ethics "are not just something we have. They're something we do."[27] They are values in action.[28] There are books and courses devoted to each of the philosophers mentioned here, so we'll take some intellectual shortcuts in the interest of distilling a single concept from each philosopher.

Aristotle (384-322 B.C.) is considered "perhaps the greatest philosopher who ever lived," and argued that moral virtue was a state of character and a way of being.[29] For our purposes here, we'll focus on his idea of the **Golden Mean**. The basic premise is that the correct course of action almost always lies between two extremes. If it helps, think of it as the Goldilocks principle of "not too hot, not too cold, but just right."

The Golden Mean refers to certain virtues, and people who have an excess or deficiency of that virtue becomes a vice. For example, the Golden Mean could be ambition, and an excess of ambition may result in someone climbing the corporate ladder by any means necessary. Meanwhile, a lack of ambition may result in someone not getting off the couch. The right answer and correct action usually lies between two extremes. Keep in mind the right thing doesn't lie in the exact middle, but along a spectrum between two extremes.

Aristotle held a high standard for getting it right, noting that it is "possible to fail in many ways ... while to succeed is possible only in one way."[30]

Our next two philosophers, Immanuel Kant and John Stuart Mill, represent two ways of thinking that are fundamentally at odds: deontology and utilitarianism. **Deontology** argues that the morality of an action is determined by the nature of the action itself, not by the potential effects it may have. **Utilitarianism** holds that actions are justified by whether they would provide the greatest good for the greatest number of people.

Kant (1724-1804) contributed a concept that we'll refer to as **universalizing the action**.[31] To determine whether or not a particular action is moral, you must ask: (1) Would the world function if everyone did this? (2) Even if the world would work, would I want to live in that world? (3) Are you using a human being as a means to an end?[32] If you answer "no" to *any* of those three questions, the action is unethical. It's a tough standard to meet, which is why it retains value.

Mill (1806-1873) was a student of Jeremy Bentham, and developed Bentham's idea of **utilitarianism** in what was termed the "Greatest-Happiness Principle." The basic idea is that "actions are right in proportion that they tend to promote happiness, wrong as they tend to produce the reverse of happiness,"[33] with happiness and unhappiness characterized by the presence or absence of pain and pleasure. A cynical view of the philosophy is that it constitutes "moral arithmetic,"[34] where "the ends justify the means." While Bentham essentially sought out actions that produced the greatest quantity of happiness, Mill examined the quantity and quality of happiness and pain produced by an action. Mill also distinguished between "higher" pleasures of the heart and mind and "lower" sensory pleasures, arguing that "higher pleasures" were qualitatively superior, since people who have experienced both prefer higher pleasures.

John **Rawls** (1921-2002) contributed what's been referred to as the **veil of ignorance**. The idea is to adopt an objective mindset that considers the viewpoints of all publics and stakeholders. It's a three-step process. First, remove all personal interests. Second, identify the relevant publics and stakeholders; and third, approach the situation from the perspective of every stakeholder. The mental exercise allows the practitioner to "walk a mile in another person's shoes," to arrive at a solution that minimizes the harm to any individual or group. The weighty concept underlying the idea is that in a different world, the people making the decision could be the ones impacted by the decision — and the moral choice is to act with that in mind. Recent studies have demonstrated that a veil of ignorance decision-making model promotes actions that are more impartial and beneficial to society.[35]

Each philosophy looks at the world in a slightly different way, and you may find greater value in one approach relative to another — that's perfectly fine. The point is that by evaluating situations through a philosophical lens, you can often arrive at a better solution, and do so in a thoughtful, methodical fashion.

Decision Time: The Potter Box

1. Facts	2. Values
3. Principles	4. Loyalties

The Potter Box is a four-step process that promotes better decision-making, and is flexible enough to be applied to any ethical quandary. It's generally advisable to start at #1 and proceed from there, but feel free to bounce between the steps as later responses may suggest new ideas.[36]

1. **Facts** define the situation. State them as objectively as possible.
2. **Values** are characteristics with great worth, such as honesty or confidentiality.
3. **Principles** apply "the wisdom of the ages," so choose your (philosophical) fighter, between Aristotle, Kant, Mill or Rawls. You can also choose to apply concepts from The Seventh Generation, The Long Now, or a Code of Ethics listed below.
4. **Loyalties** refer to whom the decision-maker has allegiance. This is a tough step. Another way of looking at it is who you should have loyalty to, and — as you arrive at a decision — who benefits from that decision?

The Potter Box isn't a Magic 8-Ball that will tell you the exact decision to make. Two well-intentioned people can use the Potter Box and come up with two different decisions. The point is that you approached the situation thoughtfully and methodically before arriving at a decision.

Professional Codes of Ethics

Professional organizations also have codes of conduct for practitioners. Scroll through a few, and you'll notice some specific points of emphasis as well as a decent amount of overlap.

PRSA: Public Relations Society of America

IPRA: International Public Relations Association

IABC: International Association for Business Communicators

AMA: American Marketing Association

IAE: Institute for Advertising Ethics

Arthur W. Page Society: Page Principles

Society of Professional Journalists: Code of Ethics[37]

Experts Talk Back:

Dr. Charles Marsh, Oscar Stauffer Professor of Journalism and Mass Communication, Emeritus, University of Kansas.

Dr. Marsh is the author of *Public Relations, Cooperation and Justice: From Evolutionary Biology to Ethics*, and co-author of the textbook *Strategic Writing: Multimedia Writing for Public Relations, Advertising and More*.

Full disclosure: The author was a student in Dr. Marsh's graduate course in Ethics. Marsh was also a committee member for his comprehensive exam and dissertation.

Q: This question is extremely broad. Aside from the KARMA Gang (Kant, Aristotle, Rawls, Mill, Agape) and maybe the PRSA Code of Ethics, I was curious if there was another philosopher, philosophy, or words of wisdom that you feel is particularly helpful as practitioners navigate these delicate ethical situations?

I am embarrassed and ashamed to be late to the party on ethics of care. It's a big field, and so to say "here's what it is" becomes pretty reductive. But one thing it does — kind of across the board — is to say all our approaches to ethical problem-solving tend to involve justice: "What's the just thing to do?"

Rawls does. Aristotle: one of his top virtues. And surely justice is a Kantian categorical imperative—it must be. The practitioners of ethics of care say, 'What if we move beyond that, or beside it?' And say, 'What if justice is not our highest motivation? What if caring about things and caring for things is even higher?'

And it's taken me a while to say. 'Okay, that's wrong, but let's do it anyway.' And then thinking — there's the old classic John Stuart Mill utilitarianism of "the greatest good for the greatest number," so if you saw two burning buildings and 12 people were in one, and just one person in the other building — but that was *our child* in the burning building, we'd go save our child.

And again, I'm being simplistic and reductive, but there's a kind of ethics of care.

And I think it's a very human and realistic thing to say that if we're really, really going to dig brutally into what values we have, very often justice and fairness are not going to be our highest values. And so that, to me, is a lot of what ethics of care is about. And it does so many things for approaching how we want to address ethical dilemmas. Because, one, it moves us beyond the patriarchal dead white guys — and those guys are so valuable and so brilliant. But one after another, with the exception of agape, leaves something that needs to be addressed, and I'm ashamed for not addressing it earlier.

Q: PR practitioners can find themselves in situations where their recommendations are ignored by leadership in favor of an approach the practitioner may view as unethical. They might view their options as either going along with that unethical act or set of actions; or if they have some decision-making power, they might drop the client, or maybe they consider a new position at a different organization.

What would you suggest that a reasonable set of considerations might be for someone who's torn between standing up for what they believe is the ethically correct thing to do versus not wanting to lose the account or lose their job? That's likely different for everyone, but is there a general set of considerations you might suggest if they find themselves in that kind of a predicament?

Yes. And like so many practitioners, I found myself in that predicament.

And this is going to sound probably glib, but I truly, truly believe this. And this is something I did not have when it happened to me: I think it is so important to have your own set of personal values.

I know that's a feel-good statement, but I'm just talking about pure self-interest, and *pure* self-defense, to have a set of values that you have deeply thought about. So, when you're in the situation you're describing, and it's intensely stressful, and you're not thinking straight, and you're probably not sleeping enough, and you're distracted and stressed — to be able to go back and say, "Okay, wait a minute, when the world was normal — *if it ever is* — but when the world was a lot quieter, here's what I said I stood for.'

And I even think to not only have your set of values but to have them ranked. And I don't know if that will help or not because things change. But to be able to say, "When the world was normal, here's what I said I believed in, and now I'm so confused, I'm just going to have to hope that I was thinking straight in those days.' And here's what I'm going to do.

Q: What advice would you have for students who are about to enter the field of PR and Strategic Communication?

One bit of advice would be to have their own statement of values. Literally, what values — and this would be true of any profession — but to help with that situation you described. Because it's going to happen. What are your values?

I think anybody else entering the profession — although AI may change this — but, you have to be a very good researcher and writer.

And then, I'm biased, but I think studies from every discipline you can name show — and I'm back to indirect reciprocity now — that if you approach this profession as relationship development, not as advocacy…The number one value of the Public Relations Society of America is advocacy. And I think that's regrettable, because it still ties our profession too much to that Edward Bernays, legal counsel model.

… The idea I would try to put in their head, selfishly because I saw this work in my profession, and all the research suggests this is correct, is to see public relations as relationship development. And relationships with whom? With people who have the resources that your organization or your client needs. And so, to see your business as building honorable, honest, win-win relationships, because those are the enduring ones. Seeing your profession doing that can be ethically satisfying and financially satisfying.

Corporate Social Responsibility: Doing Well by Doing Good

As you might recall from earlier in the chapter, there are different layers of ethics that overlap: personal (our own moral compass), organizational (reflected in an organization's mission/values/vision statement[38]), professional (articulated in codes of ethics), societal (including communal values, behavioral norms and networked framing), and international (global values and behavioral norms). These layers overlap, and there may be tension between them at times.

With respect to organizational ethics, over the past few decades, there has been an increased expectation that organizations behave in a socially responsible manner. **Corporate Social Responsibility** is the "sum of the voluntary actions taken by a company to address the economic, social and environmental impacts of its business operations and the concerns of its principal stakeholders."[39]

Photo by Ron Lach via Pexels.

Patagonia is an example of a company that prioritizes **transparency**, which is built on a foundation of trust and prioritizes accountability and open communication.[40] As its founder Yvon Chouinard put it, "You don't have to worry about telling people about all the bad stuff you're doing as long as you say, 'We're working on these things.' But if you try to be dishonest — try to hide it — it's gonna come back and bite you..."[41] To that end, Patagonia has prominently featured its own environmental footprint on its website for more than a decade.

Its transparency is radical at times. In one instance, the company publicly reported that its own auditing showed "some red flags" that "startled us" regarding the use of migrant labor in their supply chain, which Patagonia characterized as "a form of indentured servitude that could also qualify, less politely, as modern-day slavery."[42] The company announced what a series of steps it took to resolve the problem, as well as a detailed timeline. By acknowledging and owning its shortcomings rather than downplaying them, Patagonia serves as an exemplar of corporate transparency.

The Triple-Bottom Line

The "bottom line" in business refers to the profit or loss. One term that's grown in popularity in recent years is the "**triple bottom line**," which includes profit (revenue), as well as people (social well-being) and planet (environmental variables). The idea is an extension of CSR, and attempts to balance a natural profit motive alongside more socially responsible ends.

Critics argue the triple-bottom line is little more than an accounting trick that corporations use to engage in "**greenwashing**," which is the use of marketing and PR to deliberately mislead others into believing a company is more socially conscious and environmentally friendly than it actually is.

The idea of "**Doing Well by Doing Good**" is that an organization can prosper financially by being a good corporate citizen. This approach emphasizes building genuine relationships in the community and industry, and engaging in transparent dialogue.

It's not just a warm and fuzzy idea, either: It works. It's been demonstrated that "CSR is not altruistic do-gooding, but rather a way for both companies and society to prosper," and is "especially true when CSR is conceived of as a long-range plan of action."[43] In other words, when we consider The Long Now.

One example is when the SXSW festival was canceled during the pandemic, and an artist thanked a brand:

"I just wanna give a shout out to YETI who paid all the artists that were scheduled to play their SXSW party this year. They didn't have to do that and they didn't advertise it once it was done. Solid."[44]

Within the first 24 hours, there were several hundred retweets and thousands of likes, with the first response being, "My opinion of the YETI brand just went up a few clicks."[45] Doing well by doing good.

Summary: Putting it All Together

We just covered a pretty decent amount of ground.

At a basic level, it behooves a practitioner to obey the law, and it is each PR professional's responsibility to be aware of those potential issues. Ignorance is no excuse.

Ethics is not a list of things to prevent people from enjoying life. Consider ethics as a guidebook to living a good life.

Understanding and embracing moral philosophies can get you through some difficult situations. They can also help you arrive at a better decision: Apply that philosophy or code of ethics by using the Potter Box, and — with some effort — you can rest assured knowing that you considered multiple viewpoints and alternatives.

The Long Now, and Doing Well by Doing Good are more than just the PR version of "Live, Laugh, Love."

They are the bedrock of a sound, long-term strategic approach that builds genuine relationships and benefits the organization over time.

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4.

RELATIONSHIP MANAGEMENT: WORKING WITH COLLEAGUES, CLIENTS, CUSTOMERS & THE MEDIA

Nathan J. Rodriguez, Ph.D.

"The highest form of knowledge is empathy, for it requires us to suspend our egos and live in another's world."
—Plato

First, a Story...

Musician Dave Carroll just wanted to get to his next gig.

Carroll had a layover at Chicago's O'Hare Airport when he heard another passenger say the baggage handlers were loading checked bags roughly —actually throwing what looked like guitars onto the plane. He said he spoke with three employees regarding the issue, each displayed indifference.

Upon landing in Omaha, he discovered his $3,500 guitar, which had been checked, was damaged beyond repair.

Carroll filed a formal claim with United Airlines, but the company said he was not eligible to receive compensation because his claim was not submitted within 24 hours.

Carroll continued to press United for nine months following the incident, to no avail. As a last resort, he told a company representative, "Ms. Irlweg," that he'd write a song about his experience and post it online. She wished him well.

He assembled his band to film a low-budget, country-tinged song, and penned the lyrics "You broke it, you should fix it / You're liable, just admit it / I should've flown with someone else / Or gone by car / 'Cause United breaks guitars."

It went viral.

"United Breaks Guitars" accumulated 150,000 views in the first day — no small feat in 2009 — and spread quickly from there, becoming the most downloaded song on iTunes within a week.[1]

Finally, United Airlines offered to compensate him, but it was too late — the damage was already done.

The company's stock price dropped by 10% within a week, and Carroll's $3,500 guitar wound up costing shareholders $180 million.[2]

United said it hoped to learn from the incident and would incorporate the video into their internal training.

The Takeaway

Not so long ago, a person's experience with customer service was generally solitary. In the early 1980s, Coca-Cola commissioned a study that found an individual who had a good experience with a product or service would tell an average of four or five people, and those who had a bad experience would tell, on average, nine to 10 people.[3] Subsequent word-of-mouth studies would show that those numbers varied by the industry, product, and price, but that general belief persisted for decades throughout multiple industries.

Dave Carroll transformed his solitary experience with United Airlines into a public performance to be distributed and recirculated indefinitely. It worked.

And it marked the beginning of a shift in power from producers to consumers that continues to inform the way in which we think strategically about such relationships.

Introduction to Relationship Management

There is a litany of seemingly synonymous terms associated with thinking about others, but there are a couple of distinctions worth noting.

Sympathy says "I feel sorry for you," while empathy says "I understand how you feel."[4] **Empathy** requires the "cognitive, emotional, behavioral and moral capacity" to respond to the suffering of others.[5] **Compassion** is characterized as a "tender *response* to the perception of another's suffering" but it "cannot exist without empathy."[6]

Empathy and compassion are learned behaviors. Photo by Alex Green via Pexels.

Some people seem more naturally empathetic, and perhaps that's true, but studies show people can learn empathy.[7]

There's a human tendency to want to be the hero in our own story.[8] The trick is to remember that other people enjoy playing that role, too. When we feel insecure, we gravitate toward the former. When we feel confident, we remember the latter.

So, as you work with colleagues, clients, customers, and the media, how will you approach those relationships? Is your ego healthy enough to allow them to be the hero of their own story?

What We'll Cover:

- ★ Relationship Management
- ★ Working with Colleagues
- ★ Working with Clients
- ★ Working with Customers
- ★ Working with the Media

How We Got Here: Strategic Communication, PR & Relationships

Public Relations began with a focus on attracting publicity.

In the 1980s, PR educators and practitioners pivoted from a preoccupation with publicity and embraced the idea of putting relationships at the center.[9]

The line between external communication and internal communication is eroding, which is a good thing for organizations and people who represent themselves authentically. It's been suggested that for a company to achieve its communication goals, the characteristics of internal and external communication must merge.[10]

But let's take a step back.

We all know that co-worker who appears to genuinely enjoy what they do, lives in the moment, and makes tough interactions look easy. They put the needs of others first. They may even crack a joke at their own expense. There's no place they'd rather be.

This chapter won't transform every curmudgeon into that co-worker, but the focus is on how to build and maintain long-lasting relationships. It's no surprise that the relational part of Public Relations immediately follows a chapter on ethics. What follows is a set of big philosophical ideas for long-term goals, combined with tactical suggestions for day-to-day practice.

Relationship Management: The Outward Mindset

There are not just books, but entire sections of bookstores devoted to the exploration and study of relationships. There's even an entire academic field devoted to this purpose. It's not possible or desirable to review each bit of insight in this chapter, but what may be helpful is an umbrella term that encompasses a range of ideas.

The Arbinger Institute trains executives across the world through a mindset meaning a series of beliefs that shape a person or organization's objectives and goals. The Arbinger Institute emphasizes what it calls the **Outward Mindset**, which is focused on building strong relationships with others to lead to mutually positive results. To accomplish this, the outward mindset is a three-step process whereby a person:

(a) Sees the goals, needs, and challenges of others.

(b) Adjusts their efforts to be more helpful to others.

(c) Measures and holds themselves accountable for their impact on others.[11]

This is contrasted with an Inward Mindset, which encompasses behaviors intended to protect and advance an individual. Each person evaluates what they need from others, and in practice, this leads to a focus on how others impact us, rather than the impact we have on others. In doing so, "people plagued with an inward mindset are ignoring the goals, needs, and challenges of others" and will "see their circumstances and execute their work in ways that justify their self-focus." That mindset can spread throughout an organization.[12]

Arbinger has found a good test of an organization's mindset is lateral awareness or "the extent to which people are aware of the goals, needs, and challenges of individuals and teams lateral to them in the company."[13] The reason is that an inward mindset might cause someone to determine the goals of their supervisors, or employees who report to them, but self-interest cannot explain curiosity about employees who are lateral to them.

To encourage an outward mindset across the organization, begin by applying the three-step process, and don't wait for others: The key is to first change your own mindset. Mobilize around a collective goal, own your own work, and allow others to be fully responsible for theirs. Work to eliminate distinctions between yourself and others, and "to the extent you have the authority to do so, rethink systems and processes to turn them outward; create an organizational ecosystem that energizes people rather than manages objects."[14]

The success of using an outward mindset can be seen through a company like Staples Europe. After adopting Arbinger's best practices, Staples Europe was able to enhance communication between senior leaders and front-line employees leading to more collaboration and innovative results.[15]

Even though it's easy and natural to focus on our own needs, maintaining an outward mindset helps build and maintain important relationships. It may require sustained effort, but it's worth it. It's ethically sound with an added benefit of making strategic sense.

Tactical Tip: How to Provide Feedback[16]

When offering **Criticism**:

Focus on the issue, not the individual. For example: "This sentence is unclear," rather than "Your writing is unclear," depersonalizes the problem and the recipient won't take it personally and become discouraged.

When offering **Praise**:

Use "you" and "your." People love it when their work is acknowledged and appreciated. For example: "You did a fantastic job on this section," personalizes the compliment, and the recipient feels seen and appreciated.

Working with Colleagues – Internal Communication

Regardless of where you are in the organizational chart, you'll spend much of your time with co-workers. It's here that you'll have the greatest opportunity to improve organizational culture.

Photo by fauxels via Pexels.

If you do what you enjoy with people you like for an organization you genuinely believe in, you're more likely to feel happy. When any of those factors are out of alignment, it can foster a negative attitude that has ripple effects. Internal problems can snowball into external issues. The opposite is also true: A fulfilled and engaged workforce is contagious. For that reason, a brand has been characterized as a "lagging indicator of a company's culture."[17]

Four outcomes for good working relationships are:

(a) **Control Mutuality**, where each side enjoys some sense of control and influence, even if it may not be perfectly symmetrical.

(b) **Trust**, or the belief that an organization is dependable, fair and competent.

(c) **Satisfaction**, where both parties feel their expectations are being met.

(d) **Commitment**, whereby the time, effort and emotional investment is valued enough by each party to continue the relationship.[18]

It's common for executives to believe that they alone know what's best for an organization, but organizations experience better outcomes when they actively work with stakeholders to make decisions rather than persuading others to accept the outcome of decisions.[19]

Furthermore, when internal trust is high at an organization, the company thrives. The benefits range from greater profitability and return on shareholder investment to decreased turnover of top employees, better customer service, and better collaboration which enhances productivity and innovation.[20]

To understand why relationships are key to organizational success, take advice from Steve Jobs, former CEO and cofounder of Apple. "Apple is an incredibly collaborative company," Jobs said. "Teamwork is dependent on trusting the other folks to come through with their part without watching them all the time. And trusting that they'll come through with their parts. And that's what we do really well."[21]

If an organization is overrun by individuals with an inward mindset, it's easy to fall into that trap, and come to view co-workers as competitors. You might even experience schadenfreude when someone at your organization falls short of expectations. That's not a healthy headspace to inhabit. Zig when everyone else zags. Ditch schadenfreude and start practicing freudenfreude.

Tactical Tip: Practice Freudenfreude

You may have heard of "schadenfreude," the German word for taking pleasure in the misfortune of others. If you're a sports fan, you've likely experienced the emotion while watching a rival team lose in embarrassing fashion. In a movie, it might be the moment when justice is delivered to an antagonist.

The lesser-known opposite of schadenfreude is "freudenfreude," or taking pleasure in the good fortune of others. Freudenfreude has been characterized as "social glue" that makes relationships "more intimate and enjoyable."[22] Studies suggest it can "foster resilience, improve life satisfaction, and help people cooperate during a conflict."[23] Just as empathy may be learned, freudenfreude can be strengthened through practice.

- Demonstrate active interest in someone else's joy. Ask them questions about it, make eye contact, and listen to their story.
- View individual success as a broader effort.
- Share credit for your own success. "Start by sharing your win, then tell the other person how they helped."
- Don't wait on joy: cultivate it. Ask others "What was the bright spot of your day?"[24]

Working with Clients — Client Archetypes

Working with current and prospective clients can feel like a professional version of dating, because you are actively trying to project the best version of yourself while meeting the demands of the other. There's a natural inclination to focus on what you can do and what you can bring to the table — as there should be, to some extent. But using an outward mindset approach where you evaluate the goals, needs, and challenges of others can foster more meaningful and productive conversations.

As a practitioner, you'll have interactions with a wide range of clients. Some of those relationships will be straightforward and downright pleasant — and you don't really need a textbook to handle those.

> *"If I were to want to put my public relations theory development eggs in one basket, this would be it. It is difficult to think of any other field where the primary emphasis is on the relationships between organizations, between organizations and one or more groupings in society, or more generally with society itself."*
>
> –Mary Ann Ferguson, Department of Public Relations, University of Florida[25]

For situations that are a little more challenging, PR professional and author Ed Zitron developed a list of six client archetypes to better understand their characteristics and motivations.[26] Knowing these different archetypes can help PR professionals better understand a client's needs, as well as know how to meet their expectations.

1. **The Ever-Shifting Client** is a challenge because they constantly have new ideas and want to change directions. The root of the indecisiveness is often an incomplete understanding of their business or brand. They also might be scared when they don't see immediate results. It can help to be reassuring but firm. You may consider having them agree to abide by a plan for 30 or 90 days, for example, to fully assess its effectiveness.

2. **The "Whatever" Client** is one that doesn't seem to care what you'll produce. They hired you because you're the expert and they'll defer to you. They may have hired you because that's what successful organizations do. It's important to not take their apathy personally and attempt to get them engaged in the effort. Stress the importance of two-way communication and show them how they may benefit from what you suggest. Try to ensure they are on board with your ideas, instead of receiving negative feedback when it's too late.

3. **The Popular Client** is successful and knows it. They aren't sure what you can offer. It's best to look at what their strategy is not doing, and approach it from that perspective. It also helps to inquire about their long-term vision for the future, because complacency can put that future in jeopardy.

4. **The Unreachable Client** may have started off interested and excited, but now you can't reach them. It's not that they don't care, it's that they don't think they need to be involved. You'll have to initiate contact. Make it clear that you will not act on a strategy without their approval. Set appointments to get in touch, and if the client is still unreachable, reconsider the relationship.

5. **The Demanding Client** is engaged in the process, which is a good thing. They may not realize or care about how much time something could take. They may have had bad experiences, and they may not trust you. They are ultimately nervous about the outcome. It helps to prove you're competent and assuage those fears. It may be necessary to set boundaries for the working relationship, and also what would be considered "extra work" beyond your normal duties. If this client is desirable, stick with those boundaries and they will often give you space to work. "Or they will fire you and make somebody else's life miserable."[27]

6. **The Flaky Client** might not remember what you told them or might not be available when you need them. As a result, you could begin to lose respect for them and feel they aren't worth your time. The best advice is to remember that "They might just be overwhelmed by the idea of success. Show them that you can be trusted and that you expect the same from them. Make them understand that you are on the same team, that your success is their success and vice versa."[28]

Each situation is different, of course, and there's room for variations of these archetypes — which may overlap — but it can be reassuring to know that these situations are common and identifiable.

Tactical Tip: Thank You Notes

A handwritten thank you note is old school in the best possible way.

Thank you notes aren't that common, which is one reason why PR practitioners have called them a "secret weapon."[29] Some recipients might keep the note as a memento, and others will simply be pleasantly surprised by the gesture.

Brevity works: A three-sentence note will suffice. In the first sentence, "thank the person for the gift or gesture and then be specific about why you appreciate it." In the second sentence, "tell the person how the gift or act made you feel and how much you appreciate the time and thought that went into it." In the third and final sentence, you may thank them one last time and mention you look forward to your next interaction with them.[30] That's it!

If time does not permit you the few days it may take for a handwritten note to be delivered and read by the recipient, a quick thank you via text or email is better than no note at all.

Photo by RDNE Stock project via Pexels.

Experts Talk Back:

Three Questions with Len Zanni, co-owner and chief marketing officer at Big Agnes.

Big Agnes is an outdoor retailer founded in 2001 in Steamboat Springs, Colorado. It first offered sleeping pads and sleeping bags, and has expanded its product line to include items ranging from tents and camping furniture to backpacks and apparel.

Q: You're the co-owner and chief marketing officer, and have been at Big Agnes from

the start. How important is it to have such a personal knowledge of both the company and the product as you're doing the marketing for that company?

I'm part of the ownership group, and started at a public relations firm, Backbone Media, which we still use 21 years later. My partner Bill Gamber originally founded Big Agnes with another guy, and about three years into it — I had been working at Backbone on the account, and we had gotten to be good buddies. He and his original partner were like oil and water, and at a certain point they decided to part ways. We got our other friend Rich Hager involved to help buy Brad out, so that's kind of how it all started.

It helps to know the history about the brand, the history of the products, products that worked, sales lines, the products that didn't — in certain cases we still can't figure out why certain things didn't work at certain times. There's so much timing and luck and thoughtful design and testing that go into a successful product, and sometimes even ones that aren't as successful.

But our location here in Steamboat Springs is ideal for testing. Everybody who works here gets out in some capacity, whether they camp, ski, fish, ride dirt bikes, or snowmobile, or mountain bike — or all of the above — and so everybody is a user in some capacity and that really helps our testing. They also have used a lot of gear from a lot of different brands over their whole history, so people know what they like or they don't like, and that's been a large part of whatever success we've had so far. Also, our external sales reps, too, all fit that same bill. We've had a lot of long-standing reps: They know our line, they know how we design it, where we test it, and sometimes they're involved in that.

Q: How do you look at some of the relationships you have with customers, industry partners, and other organizations through the lens of ethics and corporate social responsibility?

Any of those larger relationships, whether it's with a material supplier, a manufacturing partner, a key retailer, down to our employees and sales reps, consumers — we take those personal relationships very seriously.

The majority of our manufacturers, for example, we've worked with since the beginning of whenever we started that product or that category. For example, one of the facilities we make tents in, we've been with since 2004. It's overseas. We'd spend — pre-pandemic, at least — two trips a year to visit each of our manufacturers. Our sourcing department has a Code of Compliance that we recently added to our website. So there's a lot of work both relationship-wise, but also in a more structured way. And that's the same with a lot of the materials suppliers — a similar kind of thing.

Some of our bigger vendors we go to dinner with, we hang out with, and really take those relationships seriously. We had a key buying group with one of our key retailers here in the United States, and we did a camp out with part of our crew. I think we had 25 or 27 people out at the local campground. We grilled out, had a campfire — we were able to have a fire this summer; most summers we can't because of a fire ban — so really, we like to hang out with people in that way and really get to know the person. Because that's when all the magic happens. That's when the best ideas come out, we think.

Q: For a student who will be graduating soon and wants to pursue a job in the strategic communication, marketing, and PR realm — what advice would you have for them?

I would say, especially coming from an agency background, where I was there for three-and-a-half or so years — I would say find an industry or a sector that either is closely related to your hobbies or something you're passionate about.

Find something that you can relate to and be passionate about because you're probably going to do the best job that you can for that type of an organization, whether it's the financial markets or the outdoor industry or the ski industry or the bike industry — keep pulling on that string as you create your career path, because that may be the secret to a successful career.

Now I'm not really sure that I know what I want to do in life, but that's worked out for me, so that's all I really have to go on.

Working with Customers — Customer Experience & CRM

Customer relationship management, also known as CRM to practitioners and academics, means different things to different people in different contexts. Executives at organizations hold a "wide range of views about what CRM means" because it includes physical and virtual touchpoints ranging from salespeople in retail outlets to telephone contact and direct marketing via mail, radio, and TV, as well as online and mobile interactions.[31]

A limited view of CRM is to think of it in different parts or as distinct tactics. A robust view of CRM is to consider each of those individual touchpoints in a more holistic manner — as part of a larger philosophical orientation—and recognize that doing so will benefit the organization.

Dave Carroll's "United Breaks Guitars" ushered in a new era of producer-consumer relations that forever put more power in the hands of consumers.[32] In this new order, "consumers are co-creators of value," and the creation of value does not end when the product is in the hands of the consumer. Rather, the value continues as the consumer makes their thoughts known to a wider audience.

Online communication has only added to the chorus of voices who contend relationships between organizations and publics are best viewed through the lens of interpersonal relationships.[33] It therefore stands to reason that purchases and interactions should not be thought of as isolated transactions, but as aspects of an enduring relationship.

Brands that are transparent and authentic will perform better in the long run, because they have less to worry about. They are who they say they are, and they'll stand behind it. When transparency and authenticity are absent, the organization is knowingly living a lie, and thanks to social media, it's only a matter of time before others catch on.

The entire experience for a customer should be pleasant at every touchpoint.

> *"Under-promise; over-deliver."*
>
> —Tom Peters

For in-person moments, enhance the parts of the experience that are most pleasant, and consider ways to eliminate or reduce the elements that are unpleasant. This can mean something like creating a unique unboxing experience to make the long wait in line slightly less awful. Above all, having a customer-facing staff who are knowledgeable, helpful, and competent is more important than any other type of messaging because they are the top ambassadors for the organization.[34]

For online and virtual experiences, how seamless is the process? How easy is it to navigate a site or app? How clear is your communication? Details matter.

The idea is to make it easy for customers to move on with their day and perhaps spend more money because the experience was easy and pleasant. People may show up because you have a great product, but a great experience is what keeps them coming back.[35]

Customer relationships are frequently managed in online spaces. Each situation is different, but the sets of suggestions below are broadly applicable.

Internally, you'll work to establish a cohesive team that's been trained to handle all aspects of an interaction carefully, quickly, and consistently.[36] In doing so, the organizational voice remains similar and the outcome of those conversations is not dependent upon the whims of an individual representative.

Customer service is an investment. As a general rule, you need to be active on the same platforms as the audience. Using bots and generative AI tools may be inevitable — and the light use of templates is fine, but don't rely solely upon automated responses. Keep an outward mindset and try to understand the situation and context. Finally, you don't need to be involved in each mention of your organization, and shouldn't let the emotions of the moment jeopardize an entity's reputation.[37]

Tactical Tip: How to Handle Mass Communication

It's been said that "the most effective mass communication is that which most closely approximates personal communication,"[38] and that's true in a range of contexts.

A good TV personality will often imagine they are speaking to a single person when addressing the camera.

A corporation trying to connect with consumers will humanize itself more if it mimics interpersonal communication patterns in their messages.

A nonprofit organization seeking donations from supporters knows that talking about numbers and scale is less persuasive than emphasizing a single story.

This is Water

David Foster Wallace's 2005 commencement address at Kenyon College is legendary. Wallace was a highly regarded writer who was terrified of public speaking, and rewrote his speech, "This is Water" several times. His observations regarding how we each experience reality are echoed — with far less eloquence — throughout the chapter. It's a touch over 20 minutes, but he wastes no words, so it's time well spent.

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://uen.pressbooks.pub/stratcomm/?p=187#oembed-1

Working with the Media — Media Relations

In working with the media, first realize the very idea of "the media" as a monolithic entity is incorrect. In other words, "there is no spoon."

The media is, in fact, a good number of individuals making their own decisions on a daily basis. As a general rule, they are cynical of PR efforts and in perpetual battle with deadlines. So, what can you do for them?

An outward mindset is a good place to start, because if you think like a journalist, you'll see story angles that may be of interest to them.

Journalists might not ever admire your chosen profession, but they will appreciate it if you can become a trusted resource, rather than someone who just pushes stories about their client.

Read their work, and understand the kinds of stories they might write. Offer background information on your industry or speak about broader trends without mentioning your client in each sentence. Then, when you have a story that might be of interest, they'll be more likely to listen.

Navigating the world of reporters, TV producers and social media personalities is difficult, and as a result, it's viewed as the "most sought-after competency" by both agencies and in-house communication teams.[39]

Media relations is an acquired skill. It takes time. Even if you don't experience immediate success in pitching stories or being the spokesperson for an organization, you can and should abide by the following "golden rules of media relations."[40]

1. You should provide a service for journalists, and must be available to answer questions objectively and quickly.
2. Respect and accept the independent role of the media.
3. Be honest with who you are and what you represent. Never try to cover anything up.
4. Be available when the news is bad just as you are when the news is good.

Media relations involves more than just pitching story ideas. Sometimes you and your client are the subject of media attention, whether you'd like to be or not. Photo by Afif Ramdhasuma via Pexels.

Tactical Tip: Spokesperson Training

Here's the scenario: Your client has — allegedly — done a Very Bad Thing, and members of the media have questions. Information is limited. People want answers.

As spokesperson for an organization, first identify the questions you'll likely be asked, and how you'll respond. Next, consider other "left field" questions you might be asked, and how you'd handle those.

Then develop and deploy a single key message that represents the position of the company in a way that's both accurate and positive. From there, stay on message. Having message discipline matters because it honors the group process that went into crafting it and improves audience recall.

A three-step process for staying on message is known as "bridging" or the "ABCs of Interviews," which is to:

(a) Acknowledge the question.

(b) Build a bridge from the question to the point you want to make.

(c) Communicate your message.

At the very least, the question must be acknowledged or else the bridge and message won't make sense. After answering at least a portion of the original question, incorporate a transition such as "I'm also frequently asked…" or "Let me add…" or "You can go a step further…" or "It's also important to tell your viewers/readers/listeners…" or "We might be overlooking…" All these segues provide paths to convey your key message.

Summary – Putting it all Together

This chapter has proffered bits of advice for working with colleagues, clients, customers and the media, but the overarching theme is to maintain a holistic view of the relationship instead of viewing each interaction as transactional.

We would be wise to follow the advice of Charles Marsh, who argues against egocentric models of public relations. He believes in a model centered around community. He frames "indirect reciprocity" — doing good without the expectation of receiving something in return — as the practical framework for PR and not just a stated ideal.[41]

He summons proof from evolutionary biology and economics to demonstrate there are reputational benefits from taking altruistic actions. In other words, when Party A does something nice for Party B, it's also observed by Party C — an unrelated audience that witnesses the exchange — and thinks more highly of Party A.

It's a compelling case for corporate social responsibility and exemplifies the notion of "doing well by doing good."

"Our world hangs like a magnificent jewel in the vastness of space. Every one of us is a part of that jewel, a facet of that jewel. And in the perspective of infinity, our differences are infinitesimal. We are intimately related. May we never even pretend that we are not."

—Fred "Mr." Rogers, Commencement Speech at Dartmouth College, 2002

For the most part, theories about relationships aren't necessarily complex. The difficulty lies in keeping an outward mindset when our day becomes lousy or maddening, because the temptation of the moment may be an emotional reaction.

Such a reaction may be justified, but ultimately is not productive.

Approaching situations by considering the goals, needs, and challenges of others can yield new opportunities. In addition to having the advantage of being the right thing to do, an outward mindset makes strategic sense.

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PART II

RESEARCH & ACTION IN A SOCIAL WORLD

5.

THEORY & RESEARCH

Nathan J. Rodriguez, Ph.D.

"The themes and appeals you will use...with your publics depend in great part on your research. The researcher will discover which aspects of your venture appeal to what publics. Your themes will appeal to basic motivations — a desire to be a leader or a follower, a desire for immortality or for parental love, and a host of others."
—Edward Bernays[1]

"Once in a while, you get shown the light in the strangest of places if you look at it right."
—Robert Hunter[2]

First, a Story...

Their goal was to "stop the internet."[3]

Their problem was that people scroll through social media at a rapid pace. There tends to be a lot of "sameness" in our feeds, as athletes compete with musicians, comedians, chefs, and artists for attention. Advertising for products, for events, for politicians also adds to the competition. How, as a marketing team, do you make someone stop scrolling?

Their solution: A bright orange tile.

They coordinated with hundreds of high-follower accounts on Instagram to post the bright orange tile at the same time. When someone clicked on the tile, it linked to a video. The tactic worked and the video went viral.

That video promised an immersive music festival — think Coachella meets Burning Man — held in the Bahamas. Tickets were limited, wildly expensive, and quickly sold out. Fyre Festival was slated for Spring 2017, and perhaps you're familiar with the rest of the story. It was a disaster, or perhaps more appropriately, a dumpster fire.

The festival site was undeveloped and the logistics were a nightmare. The luxury accommodations were little more than disaster relief tents with dirt floors. The gourmet meals turned out to be, in some cases, cheese sandwiches in Styrofoam containers. There was no lighting. No one roped off the hazardous parts of the island.

There was no cell or internet service. No one had running water. And there was no easy way out; the nearby resorts were fully booked, because it was their peak season.

The experience led to class-action lawsuits and a six-year prison sentence for the organizer of the festival, Billy McFarland.

The Takeaway

From a social-media marketing perspective, the festival promotion was memorable. It was based on sound principles and worked. People clicked on the image and the festival sold out.

The festival itself was an epic failure, and demonstrates what happens when you operate on a theory — an idea about how something works — without doing the research to figure out if the idea is any good.

Introduction to Theory & Research

Theories come in all shapes and sizes, and they aren't just in this chapter. You'll find them peppered throughout the text. Theories suggest ways to interpret a situation. Research allows you to better understand that situation and apply relevant theories. Relying on research alone — knowing a client's situation inside and out — will only get you so far if you don't have theories about what to do. Relying on theory alone — what tends to work — may overlook key factors that make the situation different than expected.

Theory and research matter in Public Relations because they enhance the quality of recommendations you'll make to a client and help predict what kind of success you may have. How do you design an effective communication campaign without first knowing everything possible about your client and audience? You can't. You can guess or get lucky, but you can also get it wrong and have your luck disappear.

The key is to cover your bases so your supervisor and client understand the rationale for your ideas. You'll need to understand the client, the industry, and the audience.

Those aren't just hoops to jump through, either. The most common mistake is to jump to tactics before doing the proper research. Don't reverse-engineer the research to justify your decision. Inspiration is wonderful when it strikes, but keep those ideas on the back-burner. Proceed with an open mind and follow the best information and data you are able to collect. Maybe your first good idea winds up being the best. Great. But doing that extra bit of research will "stress test" the theory, and might lead to even better ideas that resonate with the audience.

It's easy to get lost in a fog of theories and research, however. And it's easy to wonder how to apply them to your clients' real-life concerns. We'll keep the organization straightforward. We'll first get into theories and how to apply them, then finish with research, and how to apply it. By the end, if you properly apply theories and research to any given situation, you'll have a better approach and solution to help your clients.

What We'll Cover:

Theories: Definition & Types

There are countless theories regarding various situations in life. Some are popular and some are relatively unknown. Some theories deal with major issues, while others focus on minutiae. **Theories** are "tools that help us see and understand the surrounding 'reality,' and different kinds of theories guide what we focus on, perceive, and understand…" so they may be thought of as "lenses through which we consider 'reality.'"[4]

PR and Strategic Communication practitioners operate on theories that explain why certain communication efforts may succeed or fail. When a client or higher-up asks why your approach will work, a theory is the explanation that follows the word "because" in your answer. Hopefully your response is more than "because I think it will work" and includes research and data to support your approach.

Theories can be categorized in a range of ways, one of which is the notion of micro-level theories, meso-level theories, and macro-level theories. Most PR and Strategic Communication involves **micro-level theories** that examine communication efforts between an entity and its stakeholders and include ideas related to crisis communication, branding, and social media. **Meso-level theories** examine communication practices at the organizational level and include things like employee communication, organizational culture, and strategic planning efforts such as a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis. **Macro-level**

theories review communication efforts in the public sphere, often through a philosophical lens, and include bigger picture efforts including how publics are conceptualized.[5]

The last couple chapters spent more time on the macro- and meso-levels, while the next several chapters focus more on the micro-level theories. Situations "more often than not" involve more than one level of analysis.[6] For example, you could rely on broad, macro-level theories embedded in a mission statement to guide your general approach, and then apply meso- or micro-level theories that are more "situational" and specific, such as how to phrase a message.

In the end, we're just playing with ideas: You'll have to roll with the theories that make the most sense and work for you. Theories may not provide an exact answer of what to do, but they'll tell you what might work.

Applying Theories

Technology changes far faster than human nature. It's therefore useful to have a basic working knowledge of consumer tendencies to understand why certain approaches may connect better than others. To that end, this section offers a quick overview of six theories useful for PR and Strategic Communication practitioners, and how they may be applied.

Up first is **AIDA**, one of the more famous marketing acronyms that's been around for more than a century. It stands for Attention, Interest, Desire, and Action. It describes an approach to create content to gain the attention of the audience, establish their interest in a product or service, instill a desire, and finally act upon that desire by doing business with that entity. If you've heard of a "sales funnel," it's the same linear process that describes how consumers tend to behave. By breaking the process down into different parts, you should be able to ascertain where the consumer is getting "stuck" and work to move them to the next step.

AISDALSLove

A seventh theory when you were promised six?

Yep: No extra charge!

Here's the deal: In recent years, it's become vogue to suggest that the AIDA model is outdated,[7] or that it's more accurate to refer to "awareness" rather than "attention."[8] But even as other theories have tried to supplant it, there's still a lot of truth left in ol' AIDA. One reasonable critique is that AIDA doesn't account for what happens after "action."

Fair enough.

A more modern take on AIDA is **AISDALSLove**: Attention, Interest, Search, Desire, Action, Like/Dislike, Share, and Love/Hate.[9] The acronym may not be memorable, but it has the benefit of accuracy. The addition of "search" describes what people tend to do once they're interested in something — they search online to find out more. Then, after "action," we now have whether they liked or disliked it, the sharing of that experience, and how the overall experience deepens their love or hate of the brand.

If you've taken a Communications Theory course, you may recall the **Uses and Gratifications Theory**, as it's one of the most popular theories in the discipline. In the 1920s, there was a moral panic surrounding bad behavior in movies, and a demand to understand the implications for moviegoers and society at large. A couple decades later, people pushed back against the premise, because they believed that people weren't helpless, but had agency and made choices. From those ideas sprung the Uses and Gratifications Theory.[10] The basic idea is that rather than being passive consumers of media, audiences are active, goal-oriented, and make conscious choices related to those goals.[11] Put another way, this theory studies what people do with media rather than what media do to people.[12] By interacting with the media, people hope to achieve a sense of gratification that ranges from entertainment or education to social engagement or escapism.

So, what can we do with that?

Uses and Gratifications theory can inform decision-making about how to reach out to an audience. A quick example: We're helping a company that sells outdoor sheds for homeowners to use in their backyard. A potential customer may not care to read an email blast about outdoor sheds, but they may care a great deal about being able to refer to instructional YouTube videos for assembly and troubleshooting.

Communication is an interactive process, and people make choices about how they interact with media. For that reason, it's helpful to put yourself in the audience's position, and ask "*What's in it for me?*" Think about what someone may hope to achieve by interacting with media content and meet them there.

Up next is **Cognitive Dissonance**, which describes a human need for psychological balance and supporting previous choices.[13] Simply put, when someone is wrong or misguided, they generally don't enjoy being told they're wrong or misguided. There's a natural tendency to prefer supporting existing opinions and choices rather than rethinking them.

A quick metaphor for cognitive dissonance is to think like a surfer riding a wave. A professional surfer can see a wave coming from a distance, and rather than oppose it directly, they leverage its inertia and move with its strength. Understanding cognitive dissonance demonstrates an appreciation for genuinely held objections, and finds creative ways to work around those arguments, rather than taking them head-on.

Cognitive dissonance is something companies can create in the mind of a potential consumer as well, and then offer their product or service as a way to return to a more balanced mental state. Advertisements from pharmaceutical companies may make someone question a mild ache or pain. A walk-in bathtub company may emphasize the danger of slipping and falling with a traditional tub. An animal advocacy group may rely on graphic footage of abused pets to drive donations from pet lovers.

Foot in the Door vs. Door in the Face

Let's say you work for the Red Cross, and want to administer an online survey that takes about 30 minutes to complete.

One strategy might be to ask someone if they'd be willing to take a 10-minute survey, and then follow up a few days later to see if they'd be willing to also take a second, final 20-minute survey. The premise, as we saw above, is to leverage our natural tendency to support existing choices.

Another strategy might be to first describe how some of the most detailed surveys require at least an hour to complete, and then ask if they'd be willing to take a survey that takes just 30 minutes.

The first example describes a "foot in the door" approach, which begins with a relatively small ask, and then builds on that initial willingness to make a larger ask. The second example is a "door in the face" approach, where the initial ask is large — and risks someone shutting the door in your face — before scaling back to the intended goal.

In both examples, we arrive at the same destination, but get there by two different paths. A meta-analysis, or study of existing research, found both techniques were equally effective.[14]

Three questions to consider:

1. What real-world examples of "foot in the door" or "door in the face" have you seen?
2. Are these approaches ethical or is it only appropriate to pitch a "true" final ask?
3. If you would employ either approach, which would it be, and why?

The **Association Principle** connects good feelings with a service or product. The idea describes the way in which consumers associate positive (or negative) feelings about products that match their approved cultural values or images.

There are plenty of positive examples of the association principle at work. When a company decides to sponsor a local 5k, food bank, or sports team — it may be due to a genuine desire to do good in the community, and it may also stem from a desire to be associated with something the local community already holds in high esteem. It can be a win-win. The association principle also explains why brands will pay top-dollar for product placement in a popular show or movie. Product placements — also known as an integrated promotion,[15] virtual product placement[16] or digital insertion[17] — allow advertisers to blend into programs rather than being a "skippable" ad. Finally, the Aesthetic Association Principle explains why, when we know little else about a product, we tend to gravitate toward labels that are visually pleasing. We transfer our good feelings regarding that label to the product itself.[18]

A classic example of the association principle is this advertisement by Budweiser during the Super Bowl just a few months after Sept. 11, 2001 terrorist attacks. The beer company, well-known for its outrageous Super Bowl ads, adjusted its tone to fit the national sentiment. It went with a 1-minute ad, with no dialogue or voice-overs, that subtly displayed the company logo only at the very end. It aired on television only once.[19]

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://uen.pressbooks.pub/stratcomm/?p=144#oembed-1

Using the association principle, how would you describe Budweiser's strategic construction of the commercial?

The association principle also explains why brands partner with influencers.[20]

Fit describes the ideological and stylistic match between a brand and an influencer.[21] Fit is generally viewed as the primary factor in the success of an endorsement. It's recommended that brands "exercise extreme caution" in these partnerships because both positive and negative information about the celebrity or influencer transfer to the brand, with negative information exerting the largest impact on the effectiveness of the endorsement.[22] Positive traits tend to transfer only under conditions of high fit, while negative traits transfer to the brand under conditions of low fit as well.[23]

The concept of fit is more involved than it may appear at first. People tend to adopt behaviors and form opinions from other people and groups that align with their own definition of self and preferred aspirational images.[24] Similarly, when someone perceives a congruence between a brand's image and their preferred self-image, that not only enhances their image of the brand — it increases their motivation to support that brand.[25] For some people, purchasing and being seen using Apple products is both a personal preference and personal statement. The more you consider fit, the more likely you'll catch a whiff of the association principle and cognitive dissonance at work.[26]

Our final theory is **Repetition**. Our final theory is Repetition. Our final theory is Repetition.

Sorry.

The persuasiveness of repetition is nothing new. In fact, thousands of years ago, Aristotle stressed that repeating words and phrases allows ideas to stick in the minds of listeners.[27] Flash forward to the modern era. For nearly a century, many advertisers and marketers have chosen to abide by the Rule of Seven, which contends that consumers need to be exposed to an advertisement seven times before they'll take action.

Of course, the consumer and advertising landscape is substantially different today — so is the rule still valid? Recent studies suggest that consumer recall increases linearly for about eight exposures before it begins to level off, and maximum attitude change is achieved at about 10 exposures.[28] So that time-tested rule isn't far off.

As you might imagine, when given the choice, people generally choose to minimize their exposure to advertisements whenever possible. Everyone pushes the "skip" button.[29] But repetition works. Repetitive advertisements are perceived as annoying while people experience it, but weeks later, those same people are shown to prefer that brand.[30]

There are quite a few caveats to these observations. The ideal amount of repetition is dependent on multiple factors, ranging from the ad type, the product or service, when and where the ad is experienced, and how the audience received the ad.

Quick question:

The Budweiser ad, as mentioned above, aired only once.

Would the company have been better off using repetition: Why or why not?

A few key points should be mentioned. First, early research suggests that short, 6-second ads — often in the form of "pre-roll" or "over the top" at the beginning of a YouTube video, for example — can be effective. In terms of recall, they are almost as effective as a 15-second ad, and are 60% as effective as traditional 30-second ads.[31] Repetition may disproportionately favor larger companies, as those companies typically enjoy a robust social media presence already. For small- and medium-sized organizations "with limited budgets," interacting with others and message repetition are among "the most direct and efficient tools" to increase brand awareness on Facebook.[32]

Last but not least: The quality of content matters more than the quantity of content. Advertising format and overall creativity are better predictors of achieving recall than repetition because people remember unique ads.[33] Furthermore, when people experience several ads back-to-back, the mere presence of creative ads reduces the recall of straightforward ads.[34] All the repetition in the world won't save a poorly crafted message.

Research: Definition & Types

Research involves a lot more than a quick search on Google or TikTok, and calling it good. That's for amateurs — not people who command a paycheck in exchange for expertise. Research can be described as the search for data combined with interpretation.

An initial distinction commonly made in research is whether it's **quantitative** or **qualitative** in nature. In other words, are the findings presented in numbers and hard data, or opinions and insights from observation? Sometimes it's a blend of the two — maybe you had respondents fill out a survey with predefined answers, and then also included a few essays — in which case, that's referred to as a **mixed method**. But this admittedly academic distinction only gets us so far in practice.

It can be helpful to characterize research in terms of what you're looking for and how you're looking for it.

As far as what to look for, there are three basic types of research we'll be interested in: client research, industry research, and audience research. Simply put, to offer sound advice, you'll first need to know about the product or service, its competition, and its target audience(s), as well as what is said by and about that entity. More on that in a moment.

In terms of how to look for that information, think of it in phases. **Casual research** collects information that's already known, and — as the name suggests —it can be quite informal, where you pick people's brains, and yes, maybe you do a quick online search.

Photo by Lukas via Pexels.

It's the type of work you might do with a handful of minutes left at the end of class. **Secondary research** requires seeking out and gathering published data, but doing so in a systematic and purposeful fashion. This is where you'll dig in to help confirm or dismiss initial knee-jerk reactions from casual research. Finally, **primary research** involves conducting your own research and generating original data.[35] Its purpose is to resolve key questions that haven't been answered at all or to update old data. Whether formal or informal, research can be understood as the process of finding information and interpreting it through a given theory or lens.

Quality Research: Sources & Databases

As a practitioner, you may have access to proprietary software and professional databases. And you may not.

As a college student, you have access to resource librarians, who can help navigate a labyrinth of sources and databases to help locate useful information.

Below is a list of common resources and specific databases to find quality information regarding a client, industry and audience:

Resources: Organizational files, trade and professional organizations, government records, syndicated reports, industry associations, business media, library archives, government documents

Databases: ABI/Inform Global, Academic OneFile, BMI Research, eMarketer, Gartner, Grolier Online, IBISWorld, Kanopy, American Fact Finder, Business Insights Essentials, Mintel Academic, PrivCo, Simmons OneView, Statista[36]

The library at the University of Missouri has a helpful overview of databases to use for each section of a situation analysis.[37]

Applied Research: The Situation Analysis

A **situation analysis** is the foundation of your overall proposal to a client. There is no single, universally used template, but it typically begins with a bird's-eye view of the company, conveys key facts regarding the client's position, and discusses the implications of those key facts. Depending on how succinct the writing is, a typical length is between 700-1,500 words.[38] At first, you may wonder how you'll fill up that space, but after reviewing a client's situation, you'll have the opposite problem: finding ways to limit your report to the most vital information.

One way to organize the situation analysis is what we'll refer to as the C.I.A. approach: client research, industry research, and audience research.[39] Each situation is different, so the lists below are best viewed as common starting points.

Client research opens with a broad introductory paragraph. It's the organization at a glance — the kind of information you'd expect to find at the beginning of a Wikipedia entry. A key component of client research is a communication audit, in which you'll review and analyze what's being said *by* and *about* the client. The idea is to better understand the client's relative strengths and weaknesses, and determine what publics like and don't like. Client research typically includes:

- Founding date
- Founder(s)
- Service or product offered

- Sense of entity's size: revenue, locations, employees
- Mission statement/vision statement
- Communication audit: internal & external communication
- Media coverage
- Website analysis
- Social media review: follower counts, engagement rates, sentiment analysis
- Overall perception of service/products offered by the client

The term "industry" refers to a group of similar organizations, often in competition with one another.[40] **Industry research** reviews this landscape and lends a sense of how the client fits in. This research can yield insights regarding competitive advantages, and what makes the client different. Industry research typically includes:

- Size and health of market
- Market share
- Identification of leaders and competitors
- Characterization of product/service of leaders and competitors
- How those products/services are typically marketed
- Industry-wide trends and challenges

Finally, **audience research** advances what's known about the client and industry, and looks for ways to connect with particular publics. Knowing the audience and what they care about can suggest what to say and how to say it. The audience is the "who" that determines the what, when, where, why, and how of messages that resonate.

Audience research typically includes[41]:

- Relevant social and lifestyle trends
- Typical consumer behavior in the industry: loyal, deal- or variety-seeking
- Demographics, psychographics of current and prospective consumers
- What those current/prospective consumers like and dislike about brands
- Evaluation of reaching out to current vs. prospective consumers
- Motivating factors in purchasing decision
- Media consumption and communication behaviors

It's easy to get numbed by numbers and data and forget that you're getting into deeply personal details of people's lives. Some data may be derived from stereotypes that are inaccurate and harmful to both the audience, and the organization's bottom line. Use this information thoughtfully, maintain an outward mindset and connect with the human rather than the data set.

The situation analysis should conclude with a paragraph or two that describes the key takeaways from these findings. Throughout the report, it can be tempting to suggest that specific actions should be taken. Hold that thought. The situation analysis simply describes the way that things are right now — prior to any recommended actions. Not until the concluding paragraph(s) is it appropriate to use these observations as a basis to pivot slightly and set the stage for a particular course of action.

Applied Research: The SWOT Analysis

Organizations and clients routinely request and conduct what's referred to as a **SWOT analysis** that reviews the Strengths, Weaknesses, Opportunities and Threats to determine a course of action. The goal is to accentuate strengths and minimize weaknesses by taking advantage of opportunities and insulating the organization against threats.

The categories are fairly self-explanatory. One distinction that is often overlooked, however, is that strengths and weaknesses examine traits and characteristics that are *internal* to the organization that help or impede the organization's ability to achieve its objectives. Opportunities and threats describe factors that are *external* to the organization that may help or impede the organization's ability to achieve its objectives.

There are different ways in which to present the findings of a SWOT analysis, but a combination of bullet points and lengthier explanations of those bullet points is generally preferable for both depth and ease of reading.

The process can be as simple or as involved as the practitioner wants. Lists and bullet points can become messy rather than methodical, which is why this chapter opts for a slightly more structured situation analysis. But even scholars who characterize a SWOT analysis as "oversimplified" for complex situations conclude that across different industries, a SWOT analysis has "more advantages than shortcomings."[42]

The Next Level: Primary Research

Secondary research is valuable, but there's no substitute for primary research, which involves conducting original research regarding a client's situation. To be fair, the communication audit from the situation analysis involves primary research in the form of a website analysis and social media review.

Primary research is necessary when secondary research is not available — perhaps the client is a small, locally owned business or a startup. Primary research helps fill in knowledge gaps. It also demonstrates to the client that you care enough about their situation to put in the effort required to make the best possible recommendations.

Entire courses and books are dedicated to exploring best practices, so we'll just briefly mention three of the more common approaches to gaining insight on consumers: interviews, focus groups, and surveys.

Interviews are one-on-one conversations to elicit information, and may be conducted in person, or via video conference, phone, or email — in that order of preference. They might be more improvised and open-ended if the goal is to explore general ideas, or the interviewer may stick to a scripted list of questions if the goal is to find answers to specific questions or maintain consistency across all interviews. Interviews are expensive and tend not to produce generalizable information, but they can yield deep insights that may be followed by more precise and large-scale studies.

A **focus group** is a small-group discussion of a particular topic facilitated by a moderator. A focus group may stand alone, follow a series of in-depth interviews, or be paired with a survey. It should consist of a representative target audience — usually between eight and 12 people, and as few as five — to help test concepts, logo designs, names, and campaign ideas. A focus group is valuable in addressing "Why?" "How?" and "What if?"[43] As with an interview, a focus group is most productive with a trained facilitator, and may also be relatively expensive.

Surveys help quantify attitudes by converting perceptions, preferences and reported behaviors into generalizable data. You must be meticulous to gain the right information. Imprecisely phrased questions or incorrect data entry can result in costly errors. Use an expert to get usable information from surveys, otherwise there may be a meaningful difference between survey respondents and the general population. Anyone can come up with a list of questions — a skilled practitioner can ensure survey data is accurate and meaningful.

Experts Talk Back:

Three questions with Eric Morgenstern, CEO and co-founder of Morningstar Communications.

Morgenstern's career spans several decades, and his work has been recognized with multiple Lifetime Achievement awards, including PR Professional of the Year and Fellow distinctions from PRSA, and

Entrepreneur of the Year and the Arthur Lowell Lifetime Achievement award from KC/IABC. He also maintains an industry-related blog at Morningstar Communications.

Q: You've mentioned ideas that seem to at least rhyme with behavioral economics in that we're irrational, but try to rationalize our actions. With respect to that as forming the basis of an operating theory that you may have, I tend to think of theories as ideas that form the basis of a strategic rationale toward taking a particular approach that incorporates, maybe, elements of persuasion or storytelling, saying "this is what works and why."

And the theory may be more implicit than explicit every single time, but I'm curious, after doing the research, how you might use some of those theories that are more on the behavioral economics or emotional side to guide your approach with a client, and say "this is where we want to be." What's the strategic rationale or the theories that drive some of those decisions?

What I do, actually, when I do presentation coaching for leaders—which I do a lot of—I'm not writing their remarks. I'm not designing their slides. What I do is I help smart people figure out what they're trying to say, and then help them say it in a way that the audience will best receive it—to do what the person wants them to do, or to think what we want them to think.

So, Clarify, Connect, Change is my positioning line. And there's nothing unique about what I do compared to other yahoos in our industry. But what I do is help clients clarify their message, connect with the people who matter most, and then change attitudes and behavior. Clarify, Connect, Change.

Now—getting back to your question—there are several things I would put in play. One of those is Think, Feel, Do.

So, we're talking to a new person. They don't know anything about ABC, and we're trying to grow our business. And I know key words and phrases that people who have already bought what we sell, because I picked it up by talking to them: Two ears, one mouth—use them in proportion—and all that. I start with a process called Think, Feel, Do.

Nathan, you're a prospect. You're someone in the community that I think could be an influencer, and I'm meeting you for the first time. You're someone where before we connect, I say to myself, "When I'm done with this interaction—whatever the interaction is—when that moment comes, when it's time for me to leave you to stand there. At that moment, what do I want you to Think, Feel and Do? Think: left brain—linear, logical, mathematical, sequential. Feel: right brain—our values, emotions. And Do: What is it I'm specifically wanting you to do? What's the action?

Q: For someone with less experience—in the context of theory and research—to present research like a situation analysis that may include some things that describe the client's current situation in less than favorable terms to members of a leadership team who may be in that same room, they may be reluctant to speak truth to power. So do you have tips on how to tread lightly perhaps in some of those areas, and other general tips regarding effective presentations as well?

Tons. Let me start with the very specific one: Delivering bad news, which is kind of what you were getting at.

Four steps. Number one, say exactly what happened. Because frequently, not everyone in the room knows exactly what happened. Let's say we had a data breach; we had fiscal impropriety; we had some shrinkage—I guarantee you, no one in the room knows everything.

So, you start by saying, "Hey, let's just level-set here. I just want everyone to know we had a data breach, the numbers show a 10% dip," whatever. Fill in the blank.

Second point, what we're doing about it. We're saying this happened. Our approach right now to stop the bleeding is "blah, blah, blah."

Three, here's what we are going to do moving forward, so this doesn't happen again. Because we learn every day, and "blah, blah, blah." And even if you don't have an answer, it could be "We need to put together an assessment team and do a post mortem on it."

And number four is, "I am sorry that we're all going through this." And you put yourself in the circle. You're not the one who caused it. Saying things like "Don't shoot me, I'm just the messenger," is cheesy.

But when you are reporting anything bad to power: What happened? What are we doing right now? What are we going to do so it doesn't happen again — and even if we don't have that answer — "Well, Billy Bob is going to lead in a process to assess," you have something. And "we're all sorry we're going through this, but we'll get through it." You use plural pronouns, and don't take ownership of something you didn't cause. If you caused it, it's a different conversation, but I don't think that's where you're coming from.

Q: What advice do you have for someone who, in the next few years, will graduate and enter the field of Public Relations and Strategic Communication?

Read great writing.

That is everything. What we now call "long-form content," or books. Periodicals. If you read The Athletic, that is excellent journalism writing, and it's all about sports. So, you can find great writing—Joe Posnanski is brilliant—he writes about sports, and it's also about life.

Read great writing, and you will do two things at the same time: You'll learn something new every day, and you'll see how the best people do it. Because I am absolutely convinced — no matter what happens with AI, no matter what happens with technology — the ability to take thoughts and put them into words will never go away.

We've been doing that as a species since — and I have this whole schtick — but the courier would roll it up and run, and then they'd put it on a horse, and then we had the printing press, and then we had Marconi and then we had TV, and then the internet...Somebody still has to pull the thought out of the brain, and get ink on paper. That's an old-fashioned term, but you know what I'm saying: Get the words down so that I can convey it.

What sticks?

You will get the ability to communicate better by reading great writing. There is a connection to it. I'll channel my inner Daniel Pink. I'll channel my inner Malcolm Gladwell—whatever. That's the first thing.

The second thing is you have to be so curious.

They say that at age 5, we ask the question "why" the most in our lives. When you were 5, you'd say, "Why is the sky blue?" "Why can't we have dessert first?" and it just goes down from there.

And most people go through their life, thinking, "Okay, well, there must be a reason. Hmm, okay." Ask "Why!"

I cannot tell you how important it is to ask "Why?"

By asking "why," you get quickly to the root of that rationale that you were talking about — the emotional aspect. Ask "why" — Don't guess at motivations. Just ask. And then ask a second "why," or tell me "so what?" Why should I care? That's another way to get to that deeper causal factor.

So, read great writing. Be super curious. Be constantly learning and getting to the root of why.

Last, I'll say: Have a bias for action.

I have a client who says, "I'm never in a bad meeting," which is his way of saying, "When I'm talking with people, it sounds good, but we're still having the same conversation." You know what I mean?

The person who has a bias for action gets ahead. Cheryl Sandberg says "Lean in." I'm not saying I'm Cheryl Sandberg, and I'm not using the phrase "Lean in." It's not a new concept. He or she who says, "I'll get the donuts," — well, you get into the meeting. "I'll make the copies." You do what's needed: You have a bias for action.

And too many young people wait for things to happen instead of going and making them happen. Here's a story on that: I'm speaking at Mizzou. I'm running the agency. And we're always looking for great interns, so I say "all the info is on our site: come and knock on our door." Young woman came up to me afterwards. "Hi, I'm Katie. My advisor told me not to do this. My parents told me not to do this. My roommate told me not to do this. But I'm doing it. Mr. Morgenstern: Here's my resume. I really want to work at Morningstar Communications."

And she had done her homework. That wasn't a gratuitous "I need a job." I was totally impressed. I said "Katie, I don't hire our interns." That's not a line — I empower my team to do that. The process is online. Please follow the process: I respect my team and don't want to circumvent that."

She said, "I understand. I just wanted to take the opportunity to meet you, and shake your hand."

I went back to the office, and I took her resume down to the person who's hiring for interns, and here's the moment: Some people like me might have been offended that she's trying to do an end-run or whatever. Not me! I say, "I like that gumption. I admire someone who has a bias for action. That's the kind of person I want on my team. I'm not telling you to hire her: I'm telling you to take a good look at her."

Two days later, I got a note from her: "Mr. Morgenstern, I enjoyed meeting you. Thanks for coming to Columbia. I did everything you said: I went online and submitted my application. I'm following up with you again simply to say I appreciate it, and thank you."

I took that note in, and said "This is the exact right way to follow up on it." I told her what to do, and she looped back, and said "I did it, and I really want to work there." She came to work for us. Intern. Then coordinator. Account exec. Today, she is running the Comms team at Evergy. It's a big gig. Take action.

Katie's that kind of person—clearly. I am that kind of person. But what if I wasn't? Katie would have never been happy working for us.

"To thine own self be true" is the other half of that. Students: If you're a duck, be a duck. If you have graphics skills, make sure I know. If you know how to use a real camera? Those are real assets. Just be you, and take action.

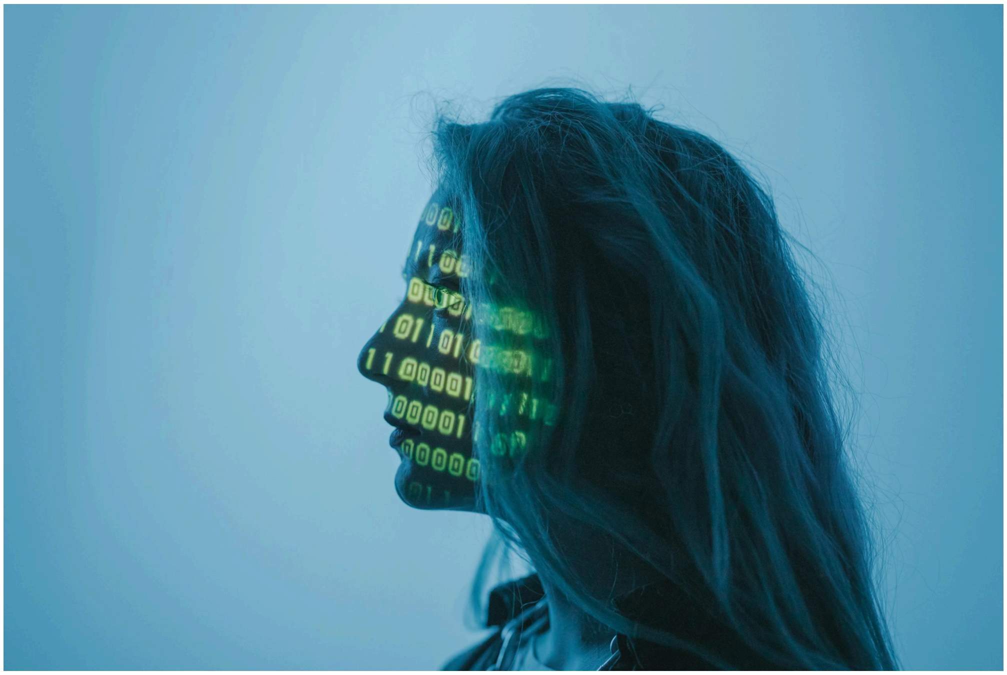
So if you're reading good writing, if you're curious, and if you take action, you're going to learn something new every day.

GAI Tools

One final, brief note about the use of Generative Artificial Intelligence: The advantages of such tools seem immediate and obvious. The disadvantages may not be as clear, but they are present.

Even though GAI is improving substantially, those tools generate inaccurate information that has the illusion of accuracy: It sounds good, but it's wrong. It's tempting to accept output as definitive, rather than as a starting point, and the danger is that it "does not encourage you to think. It encourages you to accept."[44] Experts won't be fooled by slop, so perform due diligence and double-check that each and every assertion is correct.[45]

Technological tools may make the job easier, but you still have a job to do, and that requires going beyond what any person with a functioning keyboard can do. Why would they pay you for something they can do on their own? Demonstrate your value.



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Summary: Putting it All Together

Plato argued that someone must know the absolute truth of a situation before attempting to persuade others to that truth.[46] Understanding an organization's situation requires client research, industry research, and audience research. Theories may be thought of as ideas about the way things work and lenses to interpret reality. Effective research can point to theories that suggest ways of moving forward and successfully persuade others about the absolute truth of a situation.

As the world becomes more data-driven, "intuition is no longer enough."[47] Seasoned practitioners relying on a gut feeling and experience might not secure the business of a client who has their public image, finances and future on the line. It's just not good enough to waltz in with a hunch about a fuzzy idea. You must demonstrate an understanding of the situation and show you've done the work — so bring receipts.

A final pair of arguments in favor of a detailed situation analysis — in case Plato's observation and best practices weren't enough — is that the situation analysis is the foundation of a PR proposal. And if the organization, research and writing are top-notch, it'll not only impress a potential client, it may impress future clients.

So take your time and do it well. No one will remember how quickly you did it; they'll remember how well you did it.

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Notes

1. Bernays, 1979 reprinted, p. 350.
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6.

PERSUASION, IDENTIFICATION & FRAMING

Nathan J. Rodriguez, Ph.D.

"Let's not forget that the little emotions are the great captains of our lives, and we obey them without realizing it."

—Vincent Van Gogh

First, a Story...

Kenneth Burke was unsuccessful as a college student.

He enrolled at Ohio State for a semester, then dropped out. He then attended Columbia University for a couple of years, but became frustrated by the number of prerequisites needed just to enroll in classes he actually wanted to take.

He got in touch with his dad, who was financing his education and said, "I know how to save you some money."[1]

Kenneth persuaded his dad to rent him a room in New York City near the university library. He wanted to read the books himself at his own pace — and instead of treating them as an end point, the knowledge gained became a springboard for additional research and thought.

He became friends with avant-garde writers in New York City and broadened his horizons. Kenneth never graduated from Columbia, but when he emerged from its library, he had a great deal to say about the nature of knowledge itself.

He questioned scholars who argued that logical arguments formed the basis of persuasion. He argued identification was a prerequisite for persuasion, claiming it was only possible to persuade someone "insofar as you can [speak their] language by speech, gesture, tonality, order, image, attitude, idea, identifying your ways with [theirs]."[2] Through identification, one hopes to achieve a feeling of shared interest and common ground.

The Takeaway

The most logical, coherent appeals may not be enough to persuade someone if they view you as an outsider trying to sell them something. You have to speak their language and demonstrate you understand their situation. That allows you to focus on shared interests and values in an authentic and meaningful way. A successful outcome is more likely when persuasive appeals are rooted in common ground.

Our college dropout changed the game for rhetoricians (i.e., teachers of public communication) and anyone interested in persuasion. As a self-taught scholar, he became one of the most well-known and respected thinkers of the 20th century, and academic conferences devoted solely to his work continue to this day.

Introduction to Persuasion, Identification & Framing

This chapter is edgy.

It's edgy because there remains a lively debate as to whether persuasion actually has a home in Public Relations and Strategic Communication, and if it can be deployed in an ethical manner.[3]

Let's short-circuit that debate.

Strategic Communication and persuasion are functionally indistinguishable. To suggest otherwise is to show up to a mixed martial arts fight, ready only for bare-knuckle boxing.

Persuasion can be ethical, whether it's talking someone off a building ledge or advocating for a local food bank.[4]

Ethical persuasion isn't a tool of naïve communicators, it's what works. As a practitioner, it's your job to play matchmaker for your client and their target audience. You want to build authentic relationships that will endure. The messaging must emerge from something genuine.

Welcome, my friends, to the world of persuasion.

What We'll Cover:

How We Got Here: Rhetoric, Persuasion & PR

Aristotle defined rhetoric as the art of discovering, in any particular case, all the available means of persuasion within a given situation.

Rhetoric originally focused upon the spoken word — primarily speeches — until the 20th century when the field became more interdisciplinary and included persuasive writing.[5]

Our friend in the opening anecdote, Kenneth Burke, is credited with creating a transition between "old" rhetoric that focused on persuasion, and "new" rhetoric that approached it in terms of identification.[6] He broadened the traditional view of rhetoric as persuasion to include "virtually any means of 'inducing cooperation and building communities.'"[7]

Finally, toward the end of the 20th century, rhetorical scholars recognized that the audience shouldn't be viewed as singular and unified, but "multiple and conflicted, composed of numerous … positions."[8] As mentioned earlier in this book, our audience is not a public but multiple sets of publics.

The idea of building communities is, of course, key to virtually every PR effort. And the view of the audience as multifaceted is a guiding principle of Strategic Communication. It therefore stands to reason that PR and Strategic Communication practitioners could adapt some ideas from rhetorical scholars and behavioral scientists, just as they have borrowed ideas from business and marketing for decades.

The distinction between the general public and particular publics — or the target audience — is more obvious today, thanks to the influence of social media. It's the difference between watching the nightly news on television, and scrolling through your newsfeed on a social media platform. The former is able to speak to a broad audience, and the latter feels as though it's speaking directly to you.

To craft tailored messages, you'll use the persuasive concepts of identification and framing.

Understanding Audience Motivations

Before considering the framing and phrasing of your message, you need to first appreciate what motivates the target audience.

What goals do they have when they interact with your content or product?

When you first ask that question, you might get an answer like "to get more information" or "to laugh."

Don't stop there.

The trick to understanding consumer behavior is to ask, "*Why is that important?*" after each of the first three responses.

For example, you could ask someone why they chew gum. They might respond that it keeps their breath fresh. And *why is that important*? Because we don't want to have bad breath when someone is close to us. And *why is that important?* Because we want to be liked by other people. And *why is that important?* Because we want to connect with other human beings in meaningful ways.

Things got real, pretty quickly. And that was just chewing gum!

While that may seem like an abstract example, it translated well. Extra won audiences over with a two-minute spot that depicted a love story and featured gum as a key plot device:

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://uen.pressbooks.pub/stratcomm/?p=147#oembed-1

Motivational States

Behavioral science attempts, in part, to understand what motivates consumers and why people make certain choices.

In the book *Marketing to Mindstates*, behavioral scientist Will Leach contends that you first need to evaluate the overall context of the consumer in terms of **location** (where someone is when they make a decision), **people** (who they're with when that decision is made), **feeling** (how they are physically and emotionally at that moment), and **framing** (how choices are presented in the moment of a decision).[9]

"Behavior design is part intuition, part artistry, and part science, all merged together to influence the heart and the mind. It doesn't replace design or great marketing — it builds on it."

—Will Leach[10]

After the context is understood, identify the points at which someone might be the most receptive to persuasion. Ask yourself, or a focus group, about the goals the consumer is trying to reach in that particular moment. Use the "Why is that important?" technique to identify consumers' emotional goals and focus on those. Evaluate that mindset and either lean into it or help create it.[11]

Leach combined more than 30 years of motivational psychology and generated a list of nine motivational states.[12] A brief description of each is below, as well as examples of companies that tend to tap into that particular motivational state.

1. **Achievement**: Being successful and proud by overcoming obstacles
(Nike, Bosch Power Tools)
2. **Autonomy**: Independent, unique, having options
(Lego, boutique store brands)

3. **Belonging**: To be accepted by and connected with others
(Harley-Davidson, CrossFit)
4. **Competence**: Being prepared, qualified, and skilled
(Microsoft, Home Depot)
5. **Empowerment**: Feeling equipped to act upon a desired choice
(Schwinn Bicycles, Patagonia)
6. **Engagement**: Being excited about or interested in an activity, nostalgia
(IKEA, Disney)
7. **Esteem**: Being approved of, respected, or admired by others
(BMW, Chanel)
8. **Nurturance**: Being loved and taken care of, and able to care for others
(Gerber, Hallmark)
9. **Security**: Being protected from threats
(ADT, Allstate Insurance)

Never underestimate the power of nostalgia! Vinyl records have had a resurgence in recent years, and now cassette tapes are making a comeback. Photo by CARTIST via Pexels.

These categories overlap, but most decisions are associated with at least one and as many as three motivations.

So in the moment that a consumer interacts with your brand's content, product or service, which motivations best describe how they want to feel?

> *"The part played by the unconscious in all our acts is immense, and that played by reason very small."*
>
> —Gustave Le Bon, *The Crowd: A Study of the Popular Mind* (1895)

Motivations vary dramatically, and different motivations require different messaging strategies.

As Leach pointed out, people may purchase organic food due to *belonging* and a desire to be part of something larger than themselves, or it might be due to *nurturing* and a desire to not have chemicals in their family's food.[13]

From there, craft the messaging in a way that taps into that specific mental state. To do that, you'll need to consider both substance and style, what you say and how you'll say it. In other words, you'll need to consider framing and phrasing.

Framing and Phrasing: A Quick Overview

How's it going?

It's one of the most basic questions we ask one another.

A typical answer might be "good" or "not bad" if the question was viewed as a brief greeting. If it's someone you have regular contact with, you might offer a few more details about school, work, or people you both know. A favorite professor always responded, "I'd be ashamed to complain."

But in all cases, the response involves framing and phrasing. **Framing** is the way in which something is characterized, and **phrasing** is the precise word choice that forms that characterization.

From there, we can expand that idea to all language. As Burke pointed out, language doesn't just reflect reality, it selects and deflects it.[14] The easiest way to think of Burke's metaphor is that it functions like taking a photo. You capture reality, but only a select part of it, because you cannot capture everything. At the same time, you might choose to deflect something in the image by cropping the photo or fixing a flaw through editing software.

Frames reflect reality, but they also select certain aspects and deflect others. Photo by Madalina Enache via Pexels.

Let's put framing into practice. If we were to ask a coworker how their vacation went, their response typically would go beyond "good" or "not bad," and the framing and phrasing choices become more obvious. And Burke's observation about language reflecting, selecting and deflecting reality becomes clear as well. The coworker may have had a good time overall (reflecting reality), but any rundown of activities or sightseeing is limited at best (selecting reality), and they may leave out unpleasant aspects like people being in a bad mood (deflecting reality).

The PR-specific literature on framing doesn't contribute much to the conversation. A handful of scholars examined whether messages about the cost of not acting were more effective than messages about the benefits of taking action, and concluded there was "no overall difference."[15] Different situations call for different methods of persuasion.

> *"The difference between the almost right word and the right word is really a large matter—'tis the difference between the lightning bug and the lightning."*
>
> —Mark Twain

The takeaway is that precise language is essential for any message to connect. Messages need to be framed and phrased in ways that are meaningful to the target audience.

And while there's no substitute for researching all there is to know about your target audience, there are a handful of theories about what tends to work. The methods of communicating messages may change, but human nature is remarkably consistent.

Experts Talk Back:

Three Questions with Ian Anderson, Partner and Vice President of Public Relations at Backbone Media.

Backbone Media works with several dozen clients including the American Pistachio Growers, Breckenridge Tourism Office, Brewer's Association, Chacos, Columbia, Eddie Bauer, Fleet Feet, Klean Kanteen, mongoose, Mountain Collective, Nike Vision, ooni pizza ovens, Patagonia, Pendleton Whisky, Pickleball Central, Public Lands, Saucony, Schwinn, Sea-Doo, Ski-Doo, Smartwool, Tecovas, Thermacell, Thule, The Wilderness Society and Yeti.

> ***Q: How do you approach the positioning of a brand in relation to its audience?***

Oftentimes the brand has worked with an agency or just has an established position that they have really held true to for many, many years.

If you take a brand — Filson, for example, it's a brand that's been around for well over a hundred years, based in the Pacific Northwest and it's really focused on making apparel and gear for the outdoors that's built to last. And so for Filson we don't change their positioning. We're not looking to — in any way, shape or form — take away from their credibility that they've worked to establish forever. But what we might do is fine-tune the positioning based upon the audience.

And for us, generally speaking on the PR side, what we do is we're working with writers and editors. And those writers and editors often are covering a certain type of story. They have a specific beat, and so we are looking to find stories that align with what they typically write about.

And so that's where we may take one aspect of a brand's story, whether that's an athlete that they sponsor or support, whether it's a nonprofit they partner with, whether it's part of a larger trend — with Filson, that may be U.S. manufacturing, or it might be particular trends around DEI, for others it might be something that's focused on sustainability. So, we're positioning those clients so that it fits within the kind of story parameters that are hopefully going to be compelling for a journalist that we're targeting for the story.

Q: It's been said that consumers create a constellation of brands or products that are part of their lives. You have clients ranging from Patagonia to pistachios. Do you find that when you have a smaller client, you could say, "Hey, you could take a picture with a Yeti in the background," since they're another one of your clients — do you try to create that sort of synergy, or do you remain focused on one particular brand at a time?

At the end of the day, since the beginning of time for public relations, it's been about relationships.

One way that we'll build relationships with key targeted media is try to get out into the outdoors, and especially around product launch, we're looking to take that product into the environment for which it's designed.

So, whether that's going on a backcountry ski trip, whether that's going on a float, whether that's going on an early morning trail run, we are taking the product and putting it on to the feet, the bodies — or whatever the product may be — we're putting it onto the writers and editors, who will then hopefully review it and write stories about it.

So, we design press trips. For us, certainly we saw fewer press trips during the pandemic, but it didn't mean they stopped, and they're kind of roaring back. At this point in time, I think we have close to two dozen press trips scheduled in the next couple of months, and some of those press trips are kind of smaller group activities where it's a lot of one-on-one kind of trips, and others are bigger, more exotic trips where we're going to a really cool destination, and we're taking eight to 10 journalists.

And in nearly every single scenario, there generally is one of our clients who has a brand-new widget that they are looking to get publicity around, but whenever we can bring other clients' products along, and complement that new product, that is a win-win. It's cost-effective for our clients because often some of the hard costs behind those press trips can be shared between brands, and then it's beneficial for the journalist so if they are going to take some time out of the office, whether that's their home office or corporate office, they then can find opportunities to write more than just one story. They can test four or five different products in one fell swoop, then they can come back and have lots of review opportunities to follow-up with down the road.

Q: What advice would you have for students who would be graduating in the next few years and want to work in the PR or Strategic Communication field generally?

Certainly, I think the landscape continues to change, but there are some fundamentals that are important. When we're looking at candidates — again, kind of on the PR side of our work — there's a couple of skill sets that are really critical.

The first is just basic communication skills, and that means that certainly we need people with strong writing skills. We are pitching to professional writers all day, every day. Most of the pitching that we do is via email. Sometimes we do pick up the phone and call folks, but the majority happens via email.

So, the emails we write don't always have to be formal, but they have to be compelling and they have to be accurate. And you lose credibility as a PR professional pretty quickly if you've got poor grammar, if you write run-on sentences, if you can't get your point across in a concise, compelling way.

So that's really critical, and communication skills certainly extend to good people skills. We do a lot of stuff in person, and so kind of understanding that customer service gene is really critical for us. And in those trips, those one-on-one's that we plan with journalists, we are basically their hosts, and so it's important to show them a really positive experience in order to paint the product and the brand in the most positive possible light. And so that communication side of things is really important.

And then for our agency, authenticity is just critical for us. For the brands that we represent, we try to really pair people's personal passions with the brands they work with. And so, the folks who work on Black Diamond are backcountry skiers and rock climbers and trail runners. Our team that works with even something like ooni pizza ovens, they love to cook. And so they get to talk about that product in a very first-person kind of way. They're out testing and using the product on their own time and when they are pitching to the media, they can talk about it from a place of credibility. And that really shines through. They're not reading from a spec sheet, they're not just using whatever the pre-approved talking points are, they're really talking about it from their own personal experience.

Framing the Message: The Psychology of Persuasion[16]

In the 1980s, Robert Cialdini developed what he referred to as the six universal principles of influence, based on years of research: reciprocity, consistency, social proof, authority, liking, and scarcity. His work has been cited tens of thousands of times over the past few decades by scholars in a range of fields from PR and marketing to rhetoric and consumer behavior.

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://uen.pressbooks.pub/stratcomm/?p=147#oembed-2

Reciprocity is the idea that people feel a sense of obligation to repay something they've received from someone else. For example, surveys sent in the mail that include a small amount of money are more likely to be filled out and mailed back by the recipient. But it also applies to someone who has said "no" to a particular ask, as they may be more likely to say "yes" to a smaller ask—which goes back to our "foot in the door" and "door in the face" approaches.

Consistency is a common motivation in that people like to be in line with their past beliefs and behaviors. This can include making a public commitment to something, whether it's a personal goal or a particular cause. It's also shown up in research where people who sign petitions in favor of a particular issue were more likely to donate money two weeks later. When presented with an opportunity to be consistent with past behavior, people tend to take it.

To sum up **social proof** in just four words: "Monkey See, Monkey Do." We have a lot going on in our lives, and we can't research absolutely every action we take, so we tend to follow the lead of others. Studies have shown that people were more likely to donate to a local charity when presented with a list of their neighbors that had donated.

Authority refers to someone's perceived expertise and trustworthiness in a particular situation. Companies that have been around for several decades typically lean into that. Expertise refers to how qualified someone might be based on their credentials and experience. But trustworthiness is an equally important factor as well. It's the difference between finding a mechanic, and finding a mechanic you'll return to.

Liking may be obvious, but people are more likely to agree with and say "yes" to someone they like. This includes less controllable interpersonal factors like physical attractiveness, but also includes a demonstrated willingness to cooperate. More importantly, similarity to and shared interest with the target audience — what Burke would call identification — is an entry point for any persuasive appeal.

Scarcity is the notion that as items and opportunities become less available, they become more attractive. If something is produced for a limited time, or in a limited edition, they tend to attract more attention. There are dozens of studies that demonstrate this effect across multiple industries, but one attention-grabbing technique in recent years has been to offer a silly or absurd — or perhaps brilliant — product in limited quantities. KFC earned substantial free media coverage by announcing its fried chicken-scented bath bomb in Japan.[17]

Some of these persuasive concepts can be directly applied in interpersonal situations. But a good chunk of PR is developing mutually beneficial relationships. And the more you can utilize these principles in framing and phrasing of your messages, the more likely it is that those messages will connect.

Phrasing the Message: Purpose, Audience & Method

Once you've figured out what you want to say, what's the best way to say it?

As we learned with identification, the best way to connect with someone is to share common ground and speak in a way that feels authentic and in touch.

Each time you formulate a message in Strategic Communication, consider three things: purpose, audience and method.[18]

The **purpose** is what you hope to achieve. The **audience** is who you're trying to persuade. The **method** is the way you interact with them.

For example, Petco may want its customers to donate to local animal shelters. The framing and phrasing of that particular request to customers will vary if the method of delivering the message was face-to-face at a checkout line, through an email blast, on a billboard, or in a 6-second spot on social media.

There's no shortage of useful theories in PR and Strategic Communications.

Considering the purpose, audience, and method is perhaps the simplest but most useful approach that can improve the outcome of any effort at communication. So, if your messaging or your thinking ever gets too cluttered, bring it back to the basics: What are you trying to accomplish? Who are you trying to reach? How are you trying to reach them?

The answer to those questions should lend a hint at how to frame and phrase your persuasive appeal. And that's really what it's all about. Remember the closing words of Chapter One: The functional aim of Public Relations and Strategic Communication is to communicate the right message at the right time in the right place to the right audience.[19]

Summary: Putting it All Together

Persuasion and Public Relations are intertwined, and even indistinguishable at times, from one another.

Before you can persuade a member of a target audience, that person has to identify with the messenger.

To promote identification, first examine the context (location, people, feeling, framing of choices) from the consumer's perspective. Figure out the goal the consumer is trying to reach through the "*Why is that important?*" series of questions. Identify their motivational state, and then craft messaging that taps into that specific mental state.

From there, it comes down to framing and phrasing the persuasive appeal. Cialdini also lends us a handful of ideas to keep in mind as you craft messages and interact with a wide range of folks.

Human nature is remarkably stubborn, so appreciating what tends to motivate people and the persuasive appeals that tend to work can go a long way.

The better you understand both the client and the potential target audience, the more likely it is that your persuasive messaging will be heard, understood, and acted upon.

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7.

BRAND STORYTELLING

Nathan J. Rodriguez, Ph.D.

"Products are made in the factory, but brands are created in the mind."
—Walter Landor[1]

First, a Story…

In the late 19th century, a couple of attorneys from Tennessee headed to Atlanta to try to bottle a soft drink.

About a dozen years prior to that journey, the soft drink company sold an average of just nine drinks per day at soda fountains. A year after their successful trip, bottles of Coca-Cola were sold in every state.

However, the company soon had a problem. By the early 1910s, most soft drinks were sold in brown or clear bottles, and Coca-Cola was constantly fending off competitors with names like Koka-Nola, Koke, and Toka-Cola, to list a few, who either copied or closely imitated the Coca-Cola font and logo. Even affixing a newly designed Coca-Cola sticker to the bottle didn't always work, as bottles were frequently sold in buckets of ice water that caused the labels to peel.

In 1915, Coca-Cola issued a challenge to several U.S. glass companies to create a new bottle—one "so distinct that you would recognize it by feel in the dark or lying broken on the ground."

The winning design featured a contoured bottle modeled after a cocoa bean.

The Root Glass Co. in Terre Haute, Indiana, created the winning design after being inspired by an illustration of a cocoa bean. Coca-Cola latched on to the notion of a contoured bottle and had it patented shortly thereafter. Because a shape was being patented, the rights only lasted for 14 years. Coca-Cola managed to renew the patent a couple more times, but by 1951, it had legally exhausted its rights to the shape.

The company then argued the shape of the bottle was distinct enough that it should be given trademark status—something the federal government had not previously granted. Coca-Cola presented findings from a 1949 study that indicated more than 99% of Americans could identify a bottle of Coca-Cola by shape alone. The government agreed, and allowed the company to trademark the bottle shape.

The Takeaway

More than 100 years later, Coca-Cola remains one of the most valuable brands on the planet, due in part to clever marketing appeals and the way it continues to creatively differentiate itself from competitors. It's a strong, recognizable brand that positions itself to appeal to the largest possible audience.

But what works for Coca-Cola may not work as well for Fanta, Minute Maid Orange Juice, or Powerade—even though all are produced by the Coca-Cola Co.—because each of those beverages has its own history and brand personality. Simply put, brands have a powerful hold on consumers because they are not just a product, but an integral part of pop culture and each individual's identity.

Introduction to Brand Storytelling

Humans are storytelling animals.[2] We store information and memories in the form of stories.[3]

Consider something you have strong feelings about—a person, product, service, or organization—and chances are, you could tell a brief story that describes what gave you that impression. You might also have told others about a particularly good or bad experience you've had.

Today's brandscape is fiercely competitive, and it's just not good enough to have an okay product or an okay story. The client must excel at both to stand out. Brand storytelling allows your client to engage a particular audience, creating persuasive appeals that create identification with a consumer, as you may recall from the previous chapter.

But brand storytelling can only go so far, because audiences talk back on social media. If the product or service doesn't align with the story your client is telling, you'll hear about it.

Now before you go around telling stories, it's essential to understand both your client and the target audience first, and then build the brand personality in a way that's authentic to the client and meaningful to that particular audience. To achieve that, it's essential to have a solid grasp of consumer psychology and human nature—as well as how stories work—and then apply that knowledge to benefit your client.

What We'll Cover:

How We Got Here

The idea of brands originated thousands of years ago when livestock owners marked their cattle to indicate ownership.[4] For hundreds of years, artisans offered their own makers' mark to signify themselves as the producer of items ranging from pottery to glasswork and even loaves of bread.

In the 19th century, the Industrial Revolution brought about standardized, mass-produced goods. Coupled with a growing patchwork of railroads that connected once-distant lands, the change allowed companies to reach new audiences. Companies still needed to build trust with consumers, who were accustomed to purchasing goods locally.[5] By the end of the 19th century, companies began to take steps to differentiate their brand from generic local products.

Bass Brewery's red triangle logo was the first image registered as a trademark in the U.K. in 1876. The Trade Marks Registration Act of 1875 took effect Jan. 1, and a Bass employee waited overnight to ensure the Bass logo would be the first registered trademark. Image courtesy of InBev.

What started with a simple symbol, name or imprint developed into a logo and stylized company name. Then came paid spokespeople, taglines and jingles.

The 1950s and 1960s are often considered the start of modern-day branding, with some of the largest consumer goods companies like Procter & Gamble and Unilever developing innovative approaches to differentiate their products from others that were functionally the same.[6]

Procter & Gamble attempted to differentiate Tide detergent from its competitors in this mid-20th century advertisement.

What is a Brand?

A brand "has no objective existence at all: It is simply a collection of perceptions held in the mind of the consumer."[7]

In one sense, a brand is a combination of the messaging and reputation a company has developed over time.[8] The product and logo are central to a brand's identity.[9] But it's also every touch point with a (potential) customer—in person and online—because those experiences shape the perception of a brand.[10]

Impressions of and relationships with brands are formed in a few different ways. Our own experience with products, services, and employees is a significant factor, as is word-of-mouth from those we trust. We also form impressions based on media reports and a company's messaging and advertising.[11] The combination of those influences result in our having a "gut feeling" about a product, service or organization. When enough people have a similar gut feeling, that's the brand.

Put another way, "Your brand isn't what you say it is. It's what they say it is."[12]

Understanding Brand-Audience Relationships

We form deep relationships with brands, just as we do with other people.

More than 100 years of studies demonstrate that people tend to assign human-like qualities to everything from food, drink, clothing, tools and weapons[13] to household technologies.[14] It's human nature to "assign roles, actions and relationships to brands in the stories [we] tell…[our]selves and others."[15]

We frequently form associations between brands and people in our lives—whether it's your grandpa's favorite steak sauce or your ex's shampoo of choice—and brands originally received as gifts tend to be associated with the giver.[16]

Brands blend into our daily routine. Someone in a strong brand relationship can experience emotions ranging from warmth and affection[17] to passion,[18] infatuation, and selfish, obsessive dependency[19]—to the point that they may have feelings of separation anxiety without it.[20] Consumers don't just buy brands because they like them, or they work well. They become involved in relationships with brands because of the meaning that's added to their lives.[21]

Consumers naturally create "self-brand connections"[22] and assemble "product constellations"[23] to express their social lifestyle. A smaller company that sells kayaks, for example, might therefore circulate images of its product being used alongside a Yeti cooler because the latter already enjoys strong brand equity.

Consumers assemble product constellations that express their social lifestyle.

Finally, it's been said "a brand should not appeal to everyone."[24] As a general rule, brands that try to mean everything to everyone wind up not meaning very much to anyone in particular. Don't attempt to accomplish the impossible. Instead, focus on creating a brand that appeals to the beliefs, attitudes, and values of your target audience.

Basic Branding Concepts

It's important to have a grasp of some key terms in branding because these concepts will help identify where the client excels, and where you can help strengthen their image.

Brand visibility is an all-encompassing term that describes how products or services are presented to audiences. While it isn't advertising or PR in a traditional sense, it matters to any practitioner and includes everything from sponsorships and giveaways to product placement, naming rights and philanthropy.[25]

Brand equity is the value of a company's reputation in the marketplace compared to a generic product: Apple and Coca-Cola frequently top lists of the most valuable brands. There are two basic components of brand equity: brand awareness and brand image. **Brand awareness** is the extent to which someone is familiar with a product or service. **Brand image** is a comparison of the status and personality of a brand to its competitors.[26]

A brand image includes aesthetics such as the packaging and logo design, and both are incredibly important, as people may forget the name of a product but recall the color of the packaging and look for that when making a purchase.[27]

But there's more to it.

A brand's image may be broken down further to include factors such as:

- **Brand associations** – characteristics used to describe a brand
- **Brand loyalty** – purchasing habits and attitudes
- **Perceived quality** – reputation for excellent products and customer experience)
- **Other proprietary assets** – patents, trademarks, relationships that offer a safeguard such that others can't easily imitate the product. The shape of the Coca-Cola bottle is one example.[28]

That's a fair amount of abstract terminology, so let's bring it back to something meaningful: Say you want to order a pizza. Where do you order from and why? You might argue that Pizza Shuttle offers the best option because it's cheap and delicious (brand association). The weekly special is one of your favorites (brand loyalty). It's always delivered piping hot and quickly (perceived quality), and the cheese is fresher than anything else in town because it's sourced from local dairy farmers (other proprietary assets).

Building a Brand

It's easy for a competitor to imitate a product or service, and as consumers have grown more skeptical in recent years, practitioners have tried to better understand branding and consumer culture.[29]

The foundation of any brand is trust, and trust takes time. The brand will be strengthened if someone has an experience with a product or service that meets or exceeds their expectations. If those expectations aren't met, they'll eventually go elsewhere.

To build a brand, start by asking the following three questions[30]: Who are you? What do you do? Why does it matter?

Pro Tip: This is an exercise where you get out of it what you put into it: If you treat the questions as obvious and something to simply get through, your conversation may not yield many meaningful insights. But some innovative ideas might emerge from the process if you approach the questions with the proper blend of research and creativity.

From there, work to create a brand image and personality that appeals to your particular audience. For example, Slim Jim, the purveyor of plastic-wrapped meat sticks found at convenience stores nationwide, speaks to its audience in a way that's fundamentally distinct from Smartwater or Grey Poupon.

It's your job to play the role of matchmaker.

New brands should try to distinguish themselves in a way that mimics the lifestyle of the target audience. Established and more mainstream brands generally seek to maintain awareness and reinforce their relationships with a target audience. Finally, a reinvented brand needs to enhance its image due to a crisis or lackluster reputation and generally will require time to repair relationships and improve its standing.[31]

Mottos, Slogans & Taglines

If you're unclear as to what the difference is between a motto, slogan, and a tagline, you aren't alone. The terms are often used interchangeably in practice because they all involve a short, memorable phrase. But there are differences.

Just as a person may have a motto by which they live their life, a brand's **motto** is a short phrase that describes its values and guiding principles. Amazon adopted "Work Hard, Have Fun, Make History" as its internal motto.

A slogan was originally defined as a rallying battle cry, and it hopes to achieve a similar response metaphorically.[32] It's a brief, memorable phrase used for temporary purposes, usually to sell a particular product.[33]

A tagline, while similar to a slogan, is more permanent, and intended to raise overall awareness of a brand.[34] Taglines are therefore seen as more PR-oriented than slogans, which historically fell into the realm of advertising and marketing.

For example, you may have heard the slogan: "*Believe in something, even if it means sacrificing everything.*" Or perhaps "*Greatness is not born, it is made.*" Or maybe "*Start unknown, finish unforgettable.*" Maybe not. But chances are you're familiar with the tagline "Just Do It." All three slogans were used in individual campaigns by Nike, which, of course, has kept its tagline for decades.

Nike's "Just Do It" is widely considered as one of the best taglines for a product. Here's a quick origin story: The creatives at Wieden + Kennedy happened to see the last words of convicted murderer Gary Gilmore were "Let's do it!" prior to his 1977 execution by firing squad in the state of Utah.[35] Inspiration can come from odd places. As far as the iconic "swoosh" is concerned, Carolyn Davidson, the graphic design student who created it in 1971, was paid a grand total of $35 for her design.[36]

There are five types of taglines.[37] **Imperative taglines** command action and usually start with a verb (Apple: "Think Different"; YouTube: "Broadcast Yourself"). **Descriptive taglines** describe the service, product or brand promise (Target: "Expect More, Pay Less"; Allstate: "You're In Good Hands"). **Superlative taglines** position the brand as the best in its class (Budweiser: "King of Beers"; BMW: "The ultimate driving machine"). **Provocative taglines** are thought-provoking and commonly ask a question (Dairy Council: "Got Milk?"; Capital One: "What's in Your Wallet?"). **Specific taglines** reveal the business category (Volkswagen: "Drivers Wanted"; The New York Times: "All the News That's Fit to Print"). These categories overlap, as Olay's "Love the Skin You're In," for example, could be seen as imperative, descriptive, provocative, and specific.

Crafting a brief, memorable phrase that conveys the essence of a brand is critical: "No principle moves the sales needle more than achieving simple clarity."[38]

Simplicity may be easy to understand, but it's difficult to execute.

Checklist for a Quality Tagline[39]:

[__] Short (usually three to six words)

[__] Differentiated from competitors

[__] Captures the brand essence

[__] Easy to say and remember

[__] No negative connotations

[__] Readable in a small font

[__] May be protected/trademarked

[__] Evokes an emotional response

Hashtags are often a simplified variant of a slogan or tagline, and can be deployed strategically to capitalize on a trend or reinforce the brand image. They may also be used whimsically to avoid being seen as "trying too hard," which generally isn't a good look for anyone online.

Brand Personality & Brand Voice

The next step is understanding how to position the brand's communication strategically.

If your product or service is the cheapest on the market, congrats on finding your niche—take the rest of the day off! Everyone else needs to carve out space in the marketplace of ideas and find ways to authentically represent your brand in a way that connects with your audience.

The **brand voice** is the overall tone in public-facing communication. Brand voice ranges from the words and phrases a company uses to visual dynamics like font choice or color. For example, look at the differences between Apple and Microsoft. Apple is distinct for its use of white space and minimalism. In contrast, Microsoft is synonymous with blocky infographics and pastel colors.

On social media, companies may verbally communicate in ways that are professional, snarky and spunky, product- and brand-focused, audience-focused, inspirational, conversational, witty, educational, or personality-focused.[40] The tone must feel authentic to the brand and must be natural rather than forced. It should also be consistent across all platforms and sustainable for those who communicate on behalf of the brand.[41]

To help find your brand voice, first think of the brand in terms of personality attributes—what it is, and is not. Next, reflect upon how audiences feel about your content, and what they get from the relationship. Then, examine your competition: How they communicate, their overall tone, and how you'd describe their brand voice. Finally, consider your goals for your content and the audience's response to that content.[42]

The goal is to develop an appealing and consistent brand personality. A **brand personality** may be considered the sum of all actions by a particular entity,[43] as interpreted by members of the target audience.

One shortcut to humanizing a brand is partnering with spokespersons and influencers. We'll dive into influencers in the next chapter, but for now, understand there might be drawbacks to tying the brand to a particular individual.

Subway embraced Jared Fogle as its spokesperson for 15 years, only to see him sentenced to more than 15 years in federal prison. Prior to his arrest, Fogle was a literal textbook example of an ideal spokesperson, referenced by numerous communication experts.

If your proposal is to "Just add influencers," it may work, but that alone is underwhelming. It's far more effective and satisfying to first cultivate a brand personality, and later focus on the method of delivery.

Experts Talk Back:

Interview with Frank Vamos, vice president of global strategic communications & creative storytelling at Wendy's.

Q: Wendy's is known for its social media presence. How was the brand voice developed?

We got into a bit of an exercise a few years back looking at the history of Wendy's and getting to know our brand inside and out. We looked at past communications to better understand those media channels, and understanding when Wendy's was at its best, and it was true to the foundation of why we were created and who we were, and trying to understand that, and what position we held against our competitors that we truly believed in. And as we looked at those communications, when were we—in our own view—at our best? And how would we define what "at our best" looked like in those communications?

If you recall, some of the Dave Thomas commercials existed a number of years back, but you had some of those commercials like "*Where's the beef*?" and there was a chicken "*Parts is parts*" commercial, and with each of them, what began to come through pretty quickly was it was never a "We're This; They're That" kind of commercial. In "*Where's the beef*?" at the heart of it, Wendy's was saying, "We have more beef in our hamburgers than McDonald's or Burger King or any other competitor." We could have come out and just done a "This or That" type of comparison, but that's not traditionally how we communicate.

We found the way to use our founder as a reflection of the brand is to say, "Hey, this is who we are." We're going to be a voice for customers in pointing out what we see is a failure in the industry. Others are hiding the amount of beef they're providing in a hamburger and trying to cut costs, and that's just not Wendy's. But we found the right way to do it. We refer to that voice as a little bit sassy, and really are identifying the right way to do that.

Fast forward to the social communications. A few years ago, McDonald's announced they were going to release fresh beef in quarter-pounders in some of their restaurants. We called 'em out, but in sort of the "Where's-the-Beef" version of that: "@McDonalds So you'll still use frozen beef in MOST of your burgers in ALL of your restaurants? Asking for a friend."

So it was that tone. We could have just issued a more formal response, but that wasn't Wendy's voice. So it was us again standing up to what we believed was a half-truth from a competitive brand and being true to the voice of Wendy's to call that out.

Social has really been a great piece for Wendy's to communicate. We've worked at it really hard over the years to make sure that it's not a social voice, it is our brand voice that comes to life in social. So we spent a lot of time figuring out what that voice was—when was Wendy's at its best—to do it, and we try to bring that every day to social.

"It's not a social voice, it's our brand voice that comes to life in social."

Q: You described it as a sassy voice. How receptive were other executives at Wendy's when you were suggesting this particular type of online style? Was there much pushback, or did it require explanation, or did they just sort of jump in and agree with the direction?

Social was a little under the radar. It wasn't seen as this powerful mechanism, so we had the opportunity as a team—and there were a lot of great individuals involved—to kind of grow it slowly, and under the radar. They knew we had it, and we probably weren't as sassy out of the gate, but it really was built on—and credit to a number of individuals here—staying true to how the Wendy's brand seemed to operate, which was focusing on the individual and recognizing them for who they were.

And that leads to a lot of things being born into our brand position of how we define our brand, but when it really came to social, it was about, "Hey, make friends and invite them to lunch," instead of selling to them directly, and so that's the language and the motto that we tend to embrace.

So how do you do that if that social user's talking about movies? How do we meet them on their ground in conversation and not just blast marketing messages at them? How do we make that connection to show that we understand who they are as individuals or as consumers? Now the hard part is we still sell hamburgers every day, so that is where our bread and butter is, but trying to understand and to operate in that world in the right way was really important to us.

Q: Is there anything else you'd like to add?

As a communications guy, I'm always fascinated by how other brands do it, and for Wendy's, if it's right for the brand; it's right for us. We've had other brands approach saying, "Well, what's your playbook look like?" And it doesn't make it a playbook that's right for other brands. I think finding that interaction and finding what your business is about and what feels right has been good for us.

Features, Benefits & Narrative Persuasion

When you deeply understand a brand, it's tempting to focus on the features of that product or service rather than how the audience will benefit.

Not everyone knows why it's good to have a vehicle with a two-axle drivetrain that can provide torque to each wheel simultaneously, but just about everyone can understand the benefits of four-wheel drive if it's put in the context of safely navigating loved ones through adverse road conditions. Focus on the benefit, not the feature.

Narrative persuasion is powerful because audiences "counter-argue" less with stories compared to more direct forms of persuasion.[44] In recent years, practitioners and academics have warmed up to the notion that images, phrases and advertisements should be considered narratives—and narrative persuasion is "any influence on beliefs, attitudes, or actions brought about by a narrative message."[45]

To craft an effective narrative, you need to appreciate basic story archetypes and identify the inherent drama in your product or service.

Client Activity: Discovering Deep Metaphors

In *Sticky Branding*, Jeremy Miller argues that great brands are built on deep metaphors, and brands should build stories around archetypes rather than stereotypes. Archetypes are universal themes that include deep metaphors. Deep metaphors are intuitive and immediately understood so as to require no explanation.

He uses a technique created by Gerald Zaltman at Harvard Business School in the mid-1970s. The idea is that humanity shares seven deep metaphors: balance, transformation, journey, container, connection, resource and control.

A quick rundown:[46] Balance involves ideas of equilibrium, adjustment, and being either centered or out-of-sorts, and on- or off-track. Transformation refers to changing a state or status in life. A journey is often a metaphor for life itself. A container keeps certain things in and other things out. Connection concerns belonging and exclusion. Resources are key to survival, and those can sometimes be particular products or services that are essential to something functioning well or making life better. Control relates to our desire to feel that our affairs are in order.

For example, Snickers uses balance/imbalance when it claims, "You're not you when you're hungry," as their commercials typically show a protagonist acting out-of-sorts due to hunger, which is resolved by a quick nibble of a candy bar. Toyota emphasizes the journey metaphor in its advertisements and tagline, "Let's Go Places."

To figure out your client's deep metaphor, ask the staff, customers, suppliers, and others to work through the following steps[47]:

1. **Pick a story**: The story should be about the company and one that's meaningful to them. For example, it could be about how they first encountered the company, how they felt about it, or how they use the product/service.
2. **Select pictures**: Next, have them find five to 20 images to tell their story. They won't be telling us a traditional story—they'll tell it with pictures. Tell them to think of it as a slideshow. This helps the storyteller be more descriptive about their experience.
3. **Share the story**: Give them 15 minutes to tell their story and be as thorough as possible. Let 'em have fun with it and encourage them to make it an epic tale. Be sure to ask them to explain why they chose particular images and what each represents.
4. **Listen**: Observe and be very patient. Be present, don't judge, and pay close attention to the details they provide. Take notes. Write down the words and phrases they use.
5. **Identify commonalities**: What are the common phrases, descriptions, or metaphors they used? Highlight those.
6. **Find the deep metaphors**: Which ones come up most frequently? Look at the most commonly used phrases and try associating a deep metaphor with each one.

7. **Pick your metaphor(s)**: Which ones best fit the brand? Limit it to a primary and possibly a secondary metaphor. Anything more than that will clutter the message.
8. **Use the Metaphor(s)**: Build the deep metaphor into the website, logo, marketing materials, and everything your brand touches. The idea is to consistently present deep metaphor visuals.

Note: There is no "official" list of archetypes. Some say there are seven basic story archetypes.[48] Consumer storytelling theorists, who focus on consumer psychology, have argued there are a dozen archetypes and "story gists."[49] Other observers argue that by examining storytelling in literature, we can identify 20 master plots, which can be utilized by organizations.[50] The list above is a solid start.

Brand Storytelling

Brand storytelling doesn't just take place on social media. It can and should inform everything from the "About Us" or "History" tab on a website, to advertising, internal messages, annual reports, feature writing, news releases, and public speeches.[51]

Stories have two key elements: chronology and causality.[52] In other words, certain actions occur over a period of time. Stories need to make sense, be believable and resonate with an audience's belief.[53] A well-told story expresses how and why life changes, and is a struggle between expectation and reality.[54]

"Desire is not a shopping list, but a core need that, if satisfied, would stop the story in its tracks."

—Robert McKee

Brands can leverage storytelling techniques effectively in ways that (1) allow users to be part of the experience; (2) listen to their audience and create relevant content; (3) highlight the brand's values; and (4) share the brand's perspective.[55]

When crafting the narrative, consider the "inherent drama" of a product or service: What makes it interesting or unusual, and how would that benefit the target audience?[56]

Stories also need **indices** and **antagonists**. Indices are the "locations, decisions, actions, attitudes, quandaries, decisions, or conclusions" in a story, and the more indices that are included in a story, the more likely it is that someone will remember the story.[57] An antagonist is whatever prevents the protagonist from achieving their desired outcome, and it may be "people, society, time, space and every object in it or any combination of these forces at once."[58]

One final distinction to consider is whether your narrative messaging comes across as a lecture or a drama. Lectures are intended for an audience, but dramas are overheard by an audience.[59] A host of studies have shown that learning through storytelling is "more memorable and retrievable" than lecture-based learning, and that drama-based advertising is "more effective in situations reflecting everyday life" than lecture-based advertising.

Show, don't tell.

Summary: Putting It All Together

The basic goal is to "create a living, breathing brand with a simple story at its core and a constantly changing set of products or services that are worth keeping an eye on."[60]

You are the matchmaker between a brand and a particular audience.

First, research and ask questions to understand the brand and the audience. What does the brand mean to the people who should care most about it?

Then, work to build meaningful connections between the brand and the audience. All brands are built on a collection of experiences, and your job is to figure out what makes your brand better and "bake that into the customer experience."[61]

Embrace simple clarity and focus on the benefits of a service or product rather than the features. Cultivate a brand personality that's authentic, deploy deep metaphors in your communication, and tell your story every chance you get—online, offline, internally and externally.

Beyond telling its story, the brand must *live* its story. Audiences talk back and will eventually figure out if a brand's story about itself is a work of fiction. Creatively telling a true story allows a brand to be relevant and endure.

Media Attributions

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- Bass Brewery is licensed under a Public Domain license

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8. SOCIAL MEDIA, INFLUENCERS & ANALYTICS

Nathan J. Rodriguez, Ph.D.

"I propose to consider the question: 'Can machines think?'"
—Alan Turing, 1950[1]

"The internet...Is that thing still around?"
—Homer J. Simpson, 1999[2]

First, a Story...

It was Sept. 25, 2020, in the middle of the pandemic, before the COVID-19 vaccines were developed, and just a few weeks away from the presidential election. In a broad sense, people were exhausted.

Nathan Apodaca lived in a trailer in Idaho Falls with inconsistent electricity and no running water. Just before 8 a.m., he climbed in his 2005 Dodge Durango that had logged more than 300,000 miles, and made his way to work at a potato warehouse, where he'd worked for more than 13 years.

Less than two miles away from work, his Durango dies. This isn't a surprise, as it happens frequently enough that Apodaca has a longboard with him. Timewise, he is cutting it close, so instead of waiting for someone to give him a ride, he grabs his longboard.

Apodaca also grabs his phone and something to drink. Moments later, he's gliding down the shoulder of a highway. He films a short clip of him taking a swig from a jug of Ocean Spray Cran-Raspberry Juice as "Dreams" by Fleetwood Mac plays in the background. A few seconds later, he turns to face the camera and lip-syncs the Stevie Nicks line, "It's only right that you should play it the way you feel it."

He uploaded the 25-second clip to TikTok, and considered deleting it. Or, as he later put it, "If they ain't feeling the vibe, I'll just pull it. No harm, no foul."[3]

It struck a chord. Within an hour, the free-spirited video had been viewed more than 100,000 times.[4] Within a couple of days, it had tens of millions of views. As one observer of popular culture put it, "Apodaca, vibing so hard and balancing such a precarious situation (the juice, the skateboard, life) so effortlessly, almost seems to emanate a Buddha-like energy in the video."[5] It was the right video at the right time.

Our story has a happy ending. Ocean Spray surprised him with a new cranberry-colored truck, loaded with dozens of bottles of Ocean Spray Cran-Raspberry Juice. Donations came pouring in from other directions, and he received more than $400,000—allowing him to pay for a new home in cash.[6] He partnered with a range of companies, guest-starred in FX's "Reservation Dogs," and launched his own line of merch.

The Takeaway

Apodaca's life was forever changed by those 25 seconds. At the time, his video generated substantial attention for Ocean Spray and Fleetwood Mac, and brought about similar tribute videos by celebrities, CEOs, and politicians.

Today, it's a good example of fleeting ubiquity on social media.

If you asked someone about the video now, chances are they may vaguely remember it—perhaps recalling the skateboarding, but maybe not his choice of song and drink. Apodaca, a.k.a. @doggface208, still creates content on TikTok, and now has more than 2 million followers, but most of his videos tend to garner around a thousand views. The rest of the world moved on.

Social media ages in dog years (or *doggface* years. Sorry). What's innovative one week or month might be old news the next. Latching on to the latest trend can work when a range of factors align, but over the long term for most organizations, that approach will be unsustainable and unmemorable. For that reason, it's worth developing a long-term strategy.

Introduction to Social Media & Analytics

If someone were asked to describe a telephone and how to use it, there would be very different responses in 1960, 1990, and 2020.[7] A similar question might be posed regarding social media in 2005, 2010, 2015, and 2020—and it would also be followed by very different responses.

Social platforms come and go with user preferences. Platforms that stick around have staying power because they capture people's attention and time. Brands that experience success online have a healthy understanding of the culture and find ways to make themselves useful.

There can and should be an emphasis on analytics—of tracking clicks, reach, and engagement.

But first things first: It's critical to first determine what you hope to achieve and how you'll do it. Otherwise, you may be left with a deep knowledge of analytics, but without a vision of how to generate better numbers.

In this chapter, we'll review a handful of principles to guide an effective approach to social media, and then briefly examine ways to think about analytics.

What We'll Cover:

Online Culture

Some core characteristics of social media are that it is peer-to-peer, participatory, conversational, and relationship-oriented.[8] Of course, the list of potential descriptors is much longer, but let's start there.

Rather than a single media outlet broadcasting messages to an audience, the lines between producers and consumers of content have blurred, as users generate content.[9]

If we return briefly to the idea of uses and gratifications theory, when someone opens an app for social media, they expect to feel and achieve something from the action. Perhaps they want to create and share content with others. Maybe they are casually scrolling to pass the time. Or maybe they are doing something in between: By reacting to and interacting with content, users co-create meaning. And of course, a user may occupy each of these roles in different ways at different times.

As incongruent with reality as it may seem, the Golden Rule of treating others the way you'd want to be treated can help us understand how social media functions. Brands must begin by thinking of social as part of a long-term strategy to build relationships, not as a digital corral to capture attention for a fleeting moment.

Fans & Parasocial Relationships

Taylor Swift. Cristiano Ronaldo. Selena Gomez. Dwayne Johnson. Justin Bieber.

Chances are, you haven't personally met any of the five people mentioned above, but you probably have an opinion about them. The same is probably true of many of your most and least favorite online personalities.

One quick way to categorize someone's relationship to a mediated figure or brand is that they are a **fan**—short for "fanatic." There are also **anti-fans**, who don't like a media persona, brand, or "text."[10] And then there are **non-fans** that might be aware of a persona, brand, or text, but don't hold any particularly strong feelings one way or the other.[11] These categorizations are not rigid. People frequently change their opinions of other people, brands, movies and sports teams. Instead, use these categories as a way to think about how to enhance those relationships.

Photo by Omar Ramadan via Pexels.

In the mid-20th century, researchers noticed that people developed an affinity and/or antipathy toward "mediated" figures in movies, radio, and television. The term **Parasocial Interaction** describes this "seeming face-to-face relationship between spectator and performer" as the media personae become "integrated into the routines of daily life."[12] Parasocial interactions are situationally bound and occur while we watch, listen, and scroll. Over time, these feelings develop into **Parasocial Relationships**, which occur over the long-term and are more enduring.[13]

After these initial observations regarding PSI and PSR were made and proven time and again through subsequent studies, researchers moved on. Then along came social media, which breathed new life into the concepts.[14]

Some key takeaways from more than 60 years of research are refreshingly straightforward. For decades, there has been a near-consensus that PSI mirrors social relationships in that people tend to use similar methods of evaluating media personae as they do in social relationships.[15],[16] People even consider their favorite media figures more favorably than good neighbors.[17] In other words, many of the concepts discussed in Chapter 4 regarding relationships dovetail neatly with best practices online.

Building Parasocial Relationships

Building parasocial relationships, as with in-person relationships, hinges on prioritizing an outward mindset (*see Chapter 4*), and seeing people **as** people. As such, people expect brands to be good corporate citizens in both the local and online communities. Brands that are viewed as adept at social are those that seem to be an authentic extension of the organization. They are perceived as transparent and genuinely interested in the welfare and opinions of their audience. Unfortunately, the focus of most organizations remains on the organization—often at the expense of prioritizing external stakeholders and publics.[18]

Engagement is a buzzword that can have different meanings based on the platform and the person using the term—and that's fine. Different types of investigation sometimes require "separate and even contradictory definitions," so definitions are just "tools that should be used flexibly."[19] Here, we'll define **engagement** as "togetherness that has a future" through ongoing and sustaining relationships.[20] There are, of course, more precise meanings with respect to analytics that we'll get to later, but if the goal is engagement, then "togetherness that has a future" is a good way to think of it.

Dialogue is a closely related concept to engagement. In a basic sense, dialogue may simply be two-way communication—but that limited view is more properly characterized as D-I-N-O, or Dialogue in Name Only.[21] True dialogue is ethically centered in nature, with "high levels of…honest, empathetic, inclusive, and trustworthy communication."[22] It adopts ideals from interpersonal communication and treats people with kindness and positive regard. This view of dialogue in public relations empowers practitioners as strategic communicators who actively build relationships,[23] rather than simple communication managers.

The 80-20 and 70-30 "Rules" of Content

Many organizations that experience success online follow two principles of content production: The 80-20 rule regarding focus, and the 70-30 rule regarding creation and curation.

The 80-20 rule, known as the Pareto Principle, contends that organizations should spend 80% of their time and content production on audience-relevant content, and just 20% of their time and production on content that's specific to the company or their products and services.[24]

The 70-30 rule is based on the idea that organizations should create 70% of all online content and curate 30% of all online content. Created content should cater to a specific audience, and may include elements such as infographics and videos. The content that's curated may be anything from articles and photos to videos and music created by others—but also has some kind of tweak from the organization, including the headline, a new image, or quotes pulled from the original that may "surprise, educate, and entertain" the audience.[25]

These two rules may not be etched in stone, but they are good general guidelines to consider when determining the appropriate content mix for an organization.

From an organizational perspective, relationship-building in online spaces is tough. There are three stages of interpersonal communication: An **initial phase** of interaction between strangers; a **personal phase** when individuals engage in an exchange of opinions, values and attitudes; and an **exit phase** where decisions are made regarding any potential future interactions.[26] The initial phase can be continuous for organizations, with a steady churn of new likes and follows. Moving beyond that initial phase can be difficult as long-time fans can become frustrated that their relationship with the organization doesn't develop more fully.[27] Organizations might want to advance those relationships, but are typically reluctant to be vulnerable enough to do so, because they lack trust and confidence in the relationship.[28] The opportunity to engage means the organization will lose exclusive control of its messages as users react to and interact with those messages — and for many organizations, that's too high a price to pay.[29]

For that reason, many organizations in recent years have outsourced the hard work of building relationships with influencers.

Influencers: Definitions & Types

First things first: Many professionals prefer "content creator" rather than "influencer," because it recognizes the value and creativity of being an influencer.[30] Other than a preference in nomenclature, the terms refer to the same thing: A person who has clout with a particular audience.

As Jia Tolentino defined it, the status of being an influencer involves "the performance of an attractive life."[31] Influencers tend to occupy the space between a friend and a celebrity[32]—with some overlap between those categories. From a Strategic Communication perspective, **Influencers** are "third-party actors that have established a significant number of relevant relationships with a specific…influence on organizational stakeholders through content production, content distribution, interaction, and personal appearance on the social web."[33]

Just as there's a lingering battle between the terms "content creator" and "influencer," there are terms such as strategic influencer communication, influencer marketing, and influencer relations that—in practice—tend to have similar, overlapping meanings.[34] For our purposes here, we'll go with a distinction between two terms: influencer marketing and influencer relationships. In some ways, it mirrors the distinction between PSI and PSR. **Influencer Marketing** characterizes a relationship with an influencer that's undertaken for a specific campaign. **Influencer Relationships** describe long-term ongoing relationships with influencers that extend beyond a particular campaign.[35] This distinction matters.

Photo by George Milton via Pexels.

There are four commonly used classifications for influencers that describe their reach: mega, macro, micro, and nano.[36] **Mega-Influencers** generally have at least 1 million followers on at least one social media platform. **Macro-Influencers** generally have 100,000-1 million followers; **Micro-Influencers** have several thousand—or tens of thousands—of followers, and **Nano-Influencers** have fewer than 5,000 followers.[37],[38],[39]

Bottle Rockets & Bonfires

Influencer marketing is transactional in nature, and influencer relationships have a more organic feel.

It can be tempting to court mega-influencers for a specific campaign, since that's easy to sell to executives interested in reach and exposure. It's been called a "hired-gun model" because you're figuring out who could be paid to do something for the organization.

A practitioner referred to the transactional approach as "the bottle-rocket model" because:

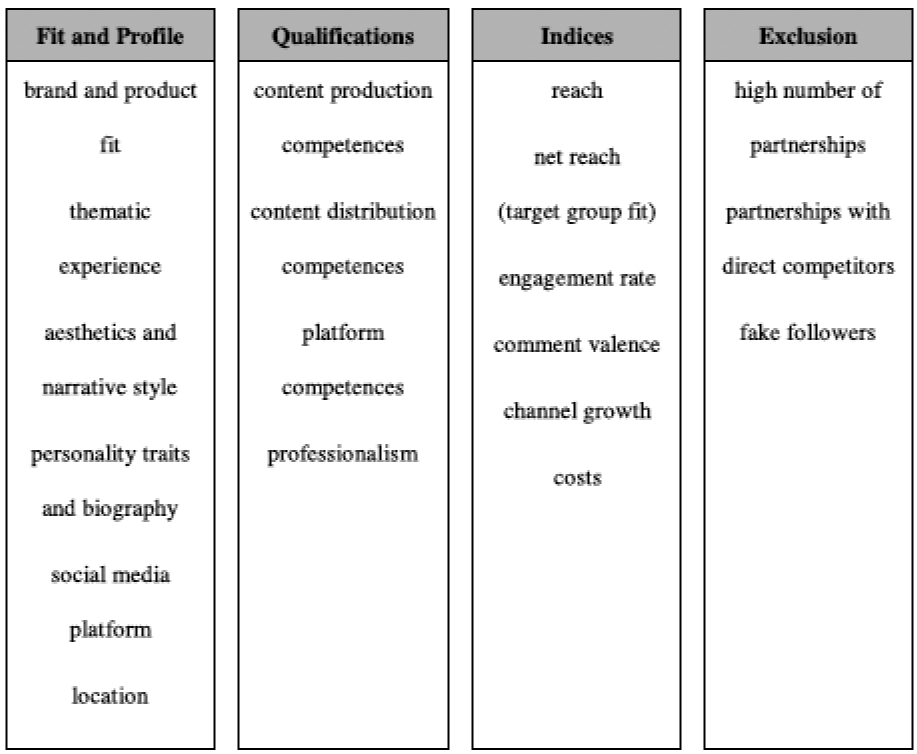
> "We light off all these different bottle rockets, and they're cool for 5 seconds. And then they disappear, and then you're like 'We're out of bottle rockets. Now what do we do?'
>
> "For me, it's about building a bonfire because a bonfire is like a beacon in the night that people come and gather around and share stories and it warms you. I always tell my team, 'It's great to have bottle rockets, but point them at the bonfire. Let's keep stoking the fire.'"

The lesson: Don't discount the value of micro- and nano-influencers who are perceived as credible and authentic by their loyal followers. Building those relationships over the long-term can yield dividends.

Working With Influencers

There are similarities and differences in working with influencers compared to other individuals and groups the organization does business with that are worth exploring. Some have argued that it requires new forms of relationship management, as influencers span the boundaries between creative agencies and advertising to journalists and opinion leaders. Therefore, influencers exist at the crossroads of marketing (traditionally selling products and creating brand awareness) and Public Relations (traditionally building relationships, reputation, and trust).[40] To be fair, those same observers have suggested that there is substantial overlap between working with influencers and traditional media relations, which manages an organization's relationships with key media organizations and journalists that shape opinions.[41]

The first and most important step is to identify influencers that are a good fit for the organization. There are agencies that connect organizations and influencers, but it's better to reach out directly because influencers value those direct relationships with the brand.[42]



It's helpful to review the factors above when deciding to potentially partner with a particular influencer. Figure from Borchers & Enke (2021).

The relationships between influencers and organizations are consistent with theories of relationship management generally: An open and honest dialogue is essential, as are feelings of control, mutuality, and listening.[43]

For larger organizations, the legal department will typically create the necessary paperwork that outlines the arrangement and is signed by both parties.[44] Beyond that step, it's complicated.

One of the most common points of contention between organizations and influencers involves creative control.[45] Some organizations and marketers want to control the content as they would with traditional advertisements, and hand the influencer a script with strict guidelines and a set of expectations. The problem with that mindset is that the influencer can feel micromanaged, and believe that this purely transactional approach to the relationship will result in content that "feels" like an ad.[46]

It's generally considered far more effective to choose influencers very carefully, set up a few guard rails, and let the influencer take it from there. That way, the influencer can create content that feels authentic to them and their audience, and lets them know they are a valued and trusted partner.[47]

Over time, and with an emphasis on relationships instead of one-time marketing, influencers tend to do things for the organization without the expectation of being paid every time. Another advantage of long-term relationships with influencers is that there becomes less of a need to find new influencers for each new campaign, and that can become a significant factor when time is of the essence.[48] These mutually beneficial relationships hedge against the risk of an influencer "going rogue" one day, while a more transactional relationship offers no such protection.[49] There's some disagreement as to whether it's appropriate for influencers to co-create campaigns with the organization, and such a decision becomes more reasonable if the influencer has a proven track record of successful campaigns.

Influencer Services	Compensations
content production	fixed monetary compensation
content distribution	flexible monetary compensation
moderation and follow-ups	monetary values
appearance as protagonist	access to experiences, events, and places
setting links, mentions, and hashtags	promotion
reporting and evaluation	support
campaign consultation and co-creation	

Influencers offer up to seven types of services in exchange for up to six types of compensation. Moderation and follow-up replies from the influencer are critical to how the message is received. Figure from Borchers & Enke (2021).

The general tendency in these relationships is to start small at first, and then ramp up expectations when it goes well. Organizations and influencers that are a good fit typically have a mutual desire to deepen the relationship in a way that feels natural and authentic. That authenticity comes at a price, though: Sometimes difficult discussions need to happen when things aren't going according to plan, and the relationship needs to be reassessed.

Finally, there are risks to relying upon influencers to communicate on behalf of an organization. From a practitioner perspective, adding influencers can become similar to instructions that are "just add water." Almost anyone could do that, so why would a client pay an expert to tell them that? From an organizational perspective, outsourcing outreach to an influencer can prevent the organization from building those relationships on its own.[50] Furthermore, it's not just content and relationship building that are being outsourced. The organization also becomes reliant on the influencer to share relevant dashboard analytics to determine the success of the initiative.

With respect to influencers and an overall strategy, it's a "both/and" rather than an "either/or." Influencers can be an effective part of a strategy, but they shouldn't be the entire strategy.

Experts Talk Back:

Three Questions with Dana El-Shoubaki, Influencer Partnerships Manager.

Dana El-Shoubaki helps brands connect with content creators, and has worked primarily with companies selling beauty and fitness products.

Q: I'm curious as to how influencer collaborations might have changed during the last handful of years that you've been in that space?

I would say in the early influencer marketing days, influencers were just excited to be working with brands. It was more about free product and exposure, but now influencers are definitely demanding pay, which makes sense, because they can't pay their rent with exposure or free product.

Brands are definitely pivoting to create a budget for that because they were definitely taking advantage of content creators back in the day. So content creators have found their voice, and now there are tools out there for content creators to figure out how much their rate should be: How much engagement do their posts get, how many followers, likes and saves?

There are analytics on the social media side, so being able to understand those analytics and how you can better pitch yourself as a content creator to those brands. Then they can see: "Oh, this person drives a lot of traffic to the website. People actually use this person's promo code." That gives the brand more of a reason to actually pay influencers rather than when they're just like, "This is how many likes I get," and they're like, "But does it translate to sales?" In the beginning, they weren't sure how to calculate that ROI, and now brands know how they want to calculate it rather than just "impressions." Impressions aren't enough now, and I was like "we need money!"

Q: In one of your responses, you mentioned working with micro-influencers. Have you found any sort of basic level of followers—whether it's mega- or macro- or micro- or nano—is potentially more effective on the brand side of things than others? Or does that just depend upon the particular client and content creator?

I would say "yes" to the first part.

So when I was at Benefit [Cosmetics], I was really focused on building out and scaling their first micro-influencer program. And the reason for that is that consumers are more inclined to trust micro-influencers because they have a smaller following. They're not getting as many brand partnerships. It's more that they're putting out the content because they like these products.

Consumers see them as more genuine than people who have hundreds of thousands of followers—or millions—because then they're like, "Oh, this might just be an ad. This might just be for a paycheck." And you'll still see the comments where they're still in support of that influencer, like "Yeah, get your coin!" or comments like that.

Consumers are smart. They know when they're being marketed to. They view people with a smaller following as more trustworthy than users with a larger following. You do see that shift once you get to influencers who are in the millions range, because they built that million-follower range for a while. So people who follow them know if they've been using this product for a few years rather than just a month ago. They keep up with that influencer, and know what they're about.

Q: What advice do you have for students who are graduating in the next few years in public relations and strategic communication in terms of skill sets, things that would be good to know, soft skills—that sort of thing—as they are about to enter the workforce?

Internships are definitely beneficial. Try to do them as soon as you can. Even if they're not paid, if you're in the space and can take an unpaid internship, do it. It just opens up your professional network. For me, I had different roles. So I was able to see, "Do I like this? No, I like this more." You learn things from your internships.

Network with your peers. You never know who knows who.

Learning how to negotiate is also huge. It's very critical. Not only negotiating for yourself, but if you get into a rule of influencer marketing, you're often negotiating contracts with influencers for the brand.

So those would be my top three: Internships. Network. Negotiate.

Another thing I would say is that everyone's on their own path. So, you might see a peer get an internship or a job right out of college, but that might not be your case. Everyone's on a different path. It'll come to you.

And it's also okay if you don't end up working in the field you graduated in.

Data Analytics: KPI's & the Zero Point

Data Analytics refers to the science of analyzing "crude data to extract useful knowledge (patterns) from them."[51] Social media dashboards are chock-full of metrics, and each platform is slightly different. There are analytics tools that are unique to, and have specific meanings for, each platform—like what counts as a "view," for example. That's why there are detailed guides on how to interpret analytics for X (formerly known as Twitter), Meta (Facebook and Instagram), TikTok, LinkedIn, and Pinterest.

There's more data on those dashboards than is meaningful, and it's up to the practitioner to first determine—based on the goals and objectives of the organization — which of those analytics matter, and why. A **Key Performance Indicator**, or KPI, is something that's important enough to measure, and should be a metric that facilitates the decision-making process. It's a widely used term in business, beyond the world of social media. A KPI stands in contrast to what are referred to as "vanity metrics," which are data that may look impressive, but don't yield any actionable information. KPIs clarify what needs to be done to improve outcomes; vanity metrics do not.

A good KPI is something that can be:

(1) actionable — based on the changes of value in the metric;

(2) understood by everyone — especially those who need to see it;

(3) from a credible source and easily accessed;

(4) easy to calculate — for the social team and other stakeholders.[52]

Matching Goals & Objectives with KPIs

Aligning Business Goals & KPIs (usually Intermediate Metrics, in the case of Social Media) for Business Success

Business Goals	**KPI 1**	**KPI 2**	**KPI 3**	**KPI 4**	**KPI 5**
Awareness	Share of voice	Social community growth	Reach, volume of conversions	Sentiment analysis (+/- neutral)	Unique commenters
Engagement	Interactions per follower	Daily active users	% of community interacting	Viral content spread	Hashtag/meme use
Lead Gen	Cost to acquire leads from social	Web referrals via social media	Qualified sales leads via social	Growth of reach in targeted audiences	Number of downloads of select content
Conversion	Downloads via tracked links	Revenue via tracked links	Cost per acquisition (CPA)	Increase % of social conversions	Revenue attribution via influencers
Customer Support	Cost savings	Decreased time of issue resolution	Sentiment change on support issues	Number of issues resolved	Resolution rate per issue/agent
Advocacy	Number of active advocates	Volume of advocate conversions	Volume of brand advocates conversions	Influence score and reach of advocates	Revenue attributed to advocates
Innovation	Number of ideas submitted related to products or services	Number of ideas that are developed into products or services	Number of bugs that are fixed in developed products or services	Community feedback from development of products or services	Engagement rate in product forums

KPI's are determined by the goals & objectives of the organization. Table from Sponder & Khan (2019).

Finally, we've all seen "before and after" photos, usually from a company trying to sell pills, creams, and lotions for things ranging from weight control to hair growth or skin care. But there's also a "before and after" involved with social media analytics. Before any moves are made on behalf of an organization, it's essential to document **the Zero Point**, which is the status of all social media accounts before implementing a new strategy for the organization. This includes not only which platforms the organization actively uses, but also its number of followers, engagement rate, and other metrics that are deemed relevant based on the organization's goals and objectives. It's impossible to demonstrate progress if the starting point is unclear, so bring receipts.

Document the zero point with screen grabs so that the client—and prospective clients—can see the difference for themselves.

How to Track Social Media Performance

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://uen.pressbooks.pub/stratcomm/?p=151#oembed-1

Understanding Analytics

Remember, data analytics isn't just about staring at numbers on a dashboard. It's about studying the relevant data points and looking for patterns that will determine the appropriate next steps.

One initial way to look at analytics is whether the data is descriptive, predictive, or prescriptive. **Descriptive Analytics** asks "What happened?" and offers insights into the past. **Predictive Analytics** asks "What could happen?" and offers insights into the future. **Prescriptive Analytics** asks "What should the company do?" and offers possible courses of action.[53] These distinctions are perhaps more interesting in theory than in practice, since descriptive analytics, such as likes, views and comments, accounts for the vast majority of analytics today.[54] The balance between descriptive, predictive, and prescriptive analytics may shift in the years ahead due to Artificial Intelligence, and it's hoped that AI may streamline the process. In Summer 2023, Google Analytics 4 was rolled out, which tracks a customer's interactions across websites and apps, uses AI to fill in gaps in data, and utilizes predictive metrics to anticipate future customer actions.[55]

Differences Between Social Monitoring & Social Listening

Both monitoring and listening are necessary parts of any social strategy. There is some disagreement as to what constitutes monitoring and listening, but we'll use the following distinction.[56]

Social Monitoring involves answering questions, resolving issues and complaints, and thanking customers for positive feedback. It's a public action that involves more individual observers than participants.

Social Listening tracks social mentions to determine which platforms are used most by the audience, how frequently the brand is mentioned relative to the competitors, and whether the industry itself is frequently discussed.[57]

Social Monitoring	**Social Listening**
Current	Future
Customer Interaction	Data Analysis
Micro-level	Macro-level
Possible without tools	Requires tools

Another practical way to approach analytics is to evaluate metrics by the type of data it yields. There are thousands of metrics, so being able to toss each one into a "bucket" based on its purpose can help determine relevant KPIs. Much of this chapter focuses on establishing and building relationships, and the social media experts at Buffer conjured up six categories of metrics: activity, reach, engagement, acquisition, conversion, and retention, and advocacy.[58]

Activity metrics refer to the output of the social media team—posts, scheduled content, problem-solving, and answering questions—and can be useful to show the organization what's been done. That data can also be useful in determining if an increase in one area results in an increase in another area.

Reach metrics examine the organization's audience and potential audience, and include everything from the number of followers to the growth rate of the audience, as well as sentiment and share of voice. Organic Reach refers to reach without the benefit of advertising or promoting the content in any way.

Engagement in the world of analytics refers to interactions and interest in the brand, as well as how people react to and share the organization's content. One common metric is the engagement rate, or the number of reactions, comments, or shares content gets (generally as a percentage of the overall audience). If that percentage seems low, don't worry: 1%-5% is common across most industries.[59] Here's a quick guide to calculate those numbers.

Acquisition describes the next stage of the customer-organization relationship, as it focuses on customer's experience on apps and websites. Common metrics include the number of subscribers and bounce rate—or the percentage of visitors who went to a single page and immediately exited. A basic premise is that people may start by casually chatting about the brand online, but then dig a little deeper on the website or app when the brand piques their curiosity.

Conversion may refer to any number of things, whether it's a download, signup, subscription, or sale. The definition of conversion depends entirely on the goal. A common metric is the conversion rate, which is the percentage of users that take a desired action (dividing the number of conversions by total traffic).

Finally, **Retention** and **Advocacy** refers to the loyalty of customers as they become brand evangelists. Basic metrics include the customer retention rate (compared to those who have canceled), reviews and ratings, and overall customer satisfaction.

Again, focus first on the goal and objective, and look to relevant KPIs to assess and act upon. Depending on the needs of the organization, it may be prudent to focus more on reach and engagement—or perhaps how to nudge customers in the acquisition or conversion phases.

Summary: Putting It All Together

People form opinions of and build relationships with people and brands online, as parasocial interactions develop into parasocial relationships.

Many of those relationships follow a similar set of rules and expectations as we have in interpersonal relationships.

Influencers are called upon more frequently by brands as a shortcut of sorts, because they already have good relationships with target audiences. Those partnerships come with some risk, however, so great care must be taken in the selection process.

Data analytics are critical to understanding the problem, charting a path forward, and understanding what success looks like. Begin with a goal/objective, connect that to KPIs, and set up processes for monitoring and listening.

Above all else, remain flexible because "no two social strategies will look the same. Social strategies are unique to each company and each brand."[60]

This chapter examined the rules of the road for social media, and how to conceptualize it from a Strategic Communication perspective. The following chapter builds on these themes and explores how to craft and implement effective social media strategies.

Media Attributions

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- FIT graphic
- Influencer services and compensation

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PART III
MESSAGE DEVELOPMENT

9. MESSAGE DEVELOPMENT IN A SOCIAL LANDSCAPE

Nathan J. Rodriguez, Ph.D.

"The enemy is noise. The goal is clarity."
—Jon Stewart[1]

"The real fact of the matter is that nobody reads ads.
People read what interests them and sometimes it's an ad."
—Howard Gossage[2]

First, a Story...

In 2018, a question was posed and answered in a single social media post:

"Why are so many young people flocking to brands on social media for love, guidance, and attention? i'll tell you why. they're isolated from real communities, working service jobs they hate while barely making ends meat, and are living w/unchecked personal/mental health problems"[3], [4]

It was a relatable message from an unexpected messenger: Steak-umm, a purveyor of frozen sliced meat. People called the company wondering if its account had been hacked.[5] The post resulted in nearly 40,000 likes and 10,000 reposts.

The next half-dozen posts from @Steak_umm took on topics ranging from student debt to homelessness and mental health. The brand even took on marketing culture itself, observing that Millennials: "grew up through the dawn of internet culture and mass advertising drilled into their media adoption, now they're being resold their childhoods by remakes, spinoffs, and other cheap nostalgia, making them more cynical to growth or authenticity."[6]

During the early months of COVID, the company's account offered suggestions regarding media literacy: a "friendly reminder in times of uncertainty and misinformation: anecdotes are not data. Good data is carefully measured and collected information based on a range of subject-dependent factors, including, but not limited to controlled variables, meta-analysis, and randomization."[7] That single tweet again went viral and resulted in write-ups in media outlets like *AdAge*, *Fast Company*, *Forbes*, *CBS*, and the *Washington Post*.

In turn, the account acknowledged that "we're a frozen meat brand posting ads inevitably to misdirect people and generate sales, so this is peak irony, but hey we live in a society so please make informed decisions to the best of your ability and don't let anecdotes dictate your worldview ok."[8]

And in case its approach wasn't transparent enough, Steak-umm clarified "as a company, our end goal will always be selling product, but rather than promoting ads overtly crafted to sell during this crisis, we are committed to: 1) providing factual, helpful information 2) bridging our cultural polarization 3) helping people who are helping people."[9]

The Takeaway

It's difficult to stand apart from the crowd on social platforms in a way that garners positive attention.

Steak-umm's management initially set a goal of reaching a younger demographic.

One formidable obstacle was the product it was selling. Surveys indicated that younger audiences prefer food that is free of antibiotics and hormones, all natural, sustainable and low in sodium—and Steak-umm "is decidedly none of these things."[10] Rather, it's a "brick of 'homogenized meat,'" that's formed of what's left after "all of the primary cuts … are removed. The emulsified meat is pressed into a loaf and sliced, frozen and packaged."[11] That's not something many people find appetizing. As one food-based publication put it in 2012, "the world's grossest meat product is probably Steak-umms."[12]

That's a tough sell.

There were other ways to highlight the product, such as framing it in terms of convenience. The company did just that with this 1982 advertisement. But such messaging would almost certainly be lost in a sea of similar pitches from similar companies selling similar products.

Where most companies would zig, Steak-umm chose to zag.

And it worked. Steak-umm found its voice, and it was seen as original enough that it couldn't easily be copied. The good feelings people had from interacting with the brand's online content transferred to the product itself. Even though the company hadn't done any additional marketing beyond social posts, sales were "up double digits across the board."[13] And in terms of online metrics, the effort was "pretty much everything a social media manager could hope for," as Steak-umm "grew its audience, built community around its social presence, had overwhelmingly positive public reactions, and even raised money for a nonprofit organization aimed at addressing hunger."[14]

The company didn't shy away from its identity as a frozen meat product. It humanized itself, and was authentic and transparent in such a way that the product itself was interesting but irrelevant. The unexpected incongruity between the messenger and the message made the content more intriguing. Minimizing the product certainly isn't a goal of most companies, but in the case of "the world's grossest meat product," that vanishing act and the traction gained on social media was remarkable.

That exact social strategy won't work for every organization, so this chapter illuminates a few other viable paths. As a practitioner, you'll have to determine the needs of your client and their audience, and then take the necessary steps to strengthen those connections.

Introduction to Message Development

This chapter emerges from the chapters that came before it, as successful message development requires a working knowledge of various topics, including how to build relationships, frame messages, and craft a brand's personality.

The study of communication has always been about the study of messages—their production, the messages themselves, and how they are interpreted.[15] Messages shape and are shaped by context. The negotiated process of sharing and creating meaning occurs within that broader context.[16]

Developing the message is the first step in that process, and focuses on crafting clear, consistent, and compelling messages for a specific audience, delivered in a specific way. A long-term creative strategy should be sustainable. Remember, we're in the business of building bonfires rather than shooting off bottle rockets. So, gather 'round, and let's get into it.

What We'll Cover:

Information & Attention

Each day, we attempt to wade across a flowing stream of ideas, information, and entertainment—each bit of which is vying for our attention. The notion of feeling inundated by different messages has been around for decades, with Nobel award-winning economist Herbert Simon arguing the balance between information and attention was a simple equation of supply and demand.

> *"In an information-rich world, the wealth of information means a death of something else: A scarcity of whatever it is that information consumes. What information consumes is rather obvious: It consumes the attention of its recipients. Hence a wealth of information creates a poverty of attention and the need to allocate that attention efficiently among the overabundance of information sources that might consume it."*
>
> —Herbert Simon (1971)[17]

Fast-forward a few decades and the imbalance in the supply and demand of information and attention has only become more pronounced. This was recognized at the turn of the 21st century, as the term **Attention Economy** was used to describe how "Attention is the real currency of businesses and individuals" and "understanding and managing attention is now the single most important determinant of business success."[18]

Message development matters because in a competitive attention economy, an average message is perceived as background noise, if it's even perceived at all. As Howard Gossage, a legend of advertising known as "The Socrates of San Francisco" once put it: "The buying of time or space is not the taking out of a hunting license on someone else's private preserve, but is the renting of a stage on which we may perform."[19] In the era of social media, there are a lot more eyeballs watching a lot more onstage performances — so it's worth learning a couple of fancy dance moves.

Individual & Group Psychology

There are times when the modern era seems to exist in isolation relative to everything that preceded it. For goodness' sake, we're getting deep thoughts and life tips from a frozen meat company. So it goes.

But as quickly as tactics and social platforms change, other elements of human nature are enduring and slower to evolve. In the late 19th century, Queen Victoria was used to sell Cadbury's Cocoa,[20] while Pope Leo XIII and Thomas Edison endorsed Vin Mariani, which was a "potent mix of Bordeaux wine and cocaine."[21] A theory of consumer behavior developed around that time posited that people look to the social class immediately above their own for behavioral cues on what to like or pay attention to.[22]

Bernays and Fleischman understood that a "fundamental study of group and individual psychology is required [to]…determine how readily individuals or groups will accept modifications of their viewpoints."[23] They believed that the primary contribution from PR practitioners was the ability "to understand and analyze obscure tendencies of the public mind," using "personal experience and knowledge," to "appeal to…instincts and universal desires."[24] And, in an observation that could have been uttered last week rather than 1923: "People accept the facts which come to them through existing channels. They like to hear new things in accustomed ways."[25]

Therefore, it becomes important to understand not only where the audience is, but also *where*—and *who*—they want to be. In this way, a brand can reinforce a consumer's **Aspirational Identity**, which is based in part on how the consumer views themselves, but is also primarily who they want to be. To that end, the brand helps the consumer on their journey. Companies such as Nike and Harley-Davidson "became iconic not by making sneakers or motorcycles, but because they helped consumers see themselves as who they want to be."[26]

Photo by Tara Winstead via Pexels.

Fun & Games Part One: Gamification

Throughout the day, the desire to be a better version of ourselves is often suspended for a moment, and we'd be just as happy with a quick laugh or nugget of entertainment. Strategic Communication approaches that understand this must also appreciate the potential drawbacks of using gamification, humor, and memes—because it's all fun and games until a brand gets hurt.

Gamification is the application of game designs, mechanics, and thinking to non-game contexts.[27] Perhaps you've experienced gamification in the classroom, where an instructor doled out gold stars or pieces of candy for correct answers. Maybe you've used a rewards card at a favorite coffee shop or restaurant. Or perhaps you set a timer to see how many household chores you could do in a certain timeframe. That last example may not be very fun, but it applies game thinking to a non-game context, so it still counts as gamification. The idea is to first determine a desired outcome, and then find creative ways to incentivize certain actions and behaviors.

Gamification is a booming industry. Estimates vary, but the global gamification market was estimated between $10 billion and $15 billion in 2022, and is projected to increase to as much as $95 billion by 2030.[28],[29] That expansion is due in part to technological advances as well as consumer preferences and the effectiveness of gamification.

There are at least a couple of reasons why gamification is effective, including internal motivation and social comparison. In other words, we enjoy achieving things, and we also care about our performance in relation to others.[30] It also works because it engages people. Engaging people "creates fans, and fans are more valuable than a catchy tagline that makes people take one action, one time" and is particularly "effective in campaigns designed to change behavior.[31]

Gamification may be used by organizations in a variety of ways, depending on the desired outcome. Common examples include incentivizing social followers to interact with posts by offering contests, as well as various programs and badges designed to enhance customer loyalty. For event planning, gamification may include things like contests and giveaways, as well as other reward systems that offer guests status and access.[32] In addition to the benefits of engagement on the front end, gamification can also lend key insights on the back end regarding customer attitudes and behavior.[33] Finally, gamification can also be used internally within an organization to spur employee learning and productivity.

There are a couple of caveats. First, the service and product need to be good enough to interest people, otherwise they simply won't care to play, regardless of how creative and compelling the game might be. Second, the gamification needs to be done well. In other words, it needs to be a fun game that someone wants to play rather than "a game" built on a flimsy premise.[34]

Is Gamification Problematic?

Nothing like a pop quiz in ethics to break up the fun & games!

It's been suggested that because gamification includes design elements intended to persuade engagement in a covert fashion, gamification should be thought of in the same way—legally and ethically—as subliminal advertising.

The legal argument is that Sections 5 and 12 of the Federal Trade Commission Act forbid advertising that's "deceptive" or "unfair," and subliminal advertising is considered deceptive.[35]

The ethics-based argument is that the covert nature of game design and its features "work at a cognitive level [that] raises ethical questions over potential deception," especially as gamification becomes "more sophisticated" and "stealthier in their persuasion."[36]

First, is that a fair criticism of gamification?

Second, the authors concluded that their hope was to "initiate discussions on…whether gamification should be regulated or monitored in some way." *What do you think?*

Fun & Games Part Two: Humor & Memes

Humor is difficult to execute. Done right, it appears natural and effortless. When done "almost right," it can appear as though a brand is trying too hard to fit in. Done wrong, and it can have lasting negative consequences. It should be deployed with care.

There are four basic types of humor: self-enhancing, affiliative, aggressive, and self-defeating.[37] Understanding how each is likely to be perceived can help determine whether a response may be appropriate.

The first two types of humor are generally positive in nature. **Self-enhancing humor** is the benign use of humor to enhance the self, where someone has a humorous outlook on life even in the face of adversity, and includes the use of humor to cope with stress. **Affiliative humor** is the benign use of humor to enhance one's relationship with others through the use of jokes and spontaneous banter. It's a non-hostile, tolerant use of humor that brings people together. It affirms the self and others, and can include inside jokes with gentle teasing of in-group members and making fun of disliked groups.

The last two types of humor are generally negative in nature. **Aggressive humor** is what we'd typically associate with bullies who have little regard for its impact on others. Here, humor is used to enhance the self at the expense of others, typically through sarcasm, teasing, and put-downs. **Self-defeating humor** is the use of humor to enhance relationships at the expense of the self. It can include self-deprecating humor, and laughing along while being disparaged as the butt of the joke. It can work in small doses but becomes psychologically unhealthy over time.[38]

Believe it or not, the U.S. Department of Health & Human Services posted this image to promote its website in 2014. It proved to be a mismatch for the intended audience (click the image to read about it). What style of humor was DHHS attempting to use?

And it's tough to discuss humor in an online context without devoting a paragraph or two to memetic communication, or memes. The term **meme** comes from the Greek word "mimeme," or "imitated thing," and was popularized by Richard Dawkins in 1976 to discuss evolutionary principles. The idea is that in evolution, genes replicate—and ideas and cultural phenomena ranging from fashion to slang and architecture—replicate in a similar way.[39] In the early 1990s, Wired magazine adapted the term to describe an infectious idea in an online context, but it took another 20 years or so for it to enter common use.[40] While memes can be image macros, or pictures with clever phrases, it should be noted that the term can be applied in a number of other contexts. Memes themselves are tiny pieces of culture that can be attached to other texts. For example, a meme could be an image, phrase, or song.

There are four essential characteristics of memes: message, evolution, malleability, and effect. First, a key message is understood through commonly shared knowledge and experiences—and that message may take the form of an image, text, audio, or video—or some combination of those forms. **Evolution** simply means that the meme isn't static, but is adopted and remixed online. **Malleability** refers to how characteristics of the original meme are changed, while still retaining enough traces of the initial message to be understood. Because memes are malleable, audiences have the ability to alter how they are understood and spread. As such, memes provide audiences an outlet to "play" with culture or the ability to clash a meme with another text for comedic purposes. Finally, **effect** refers to the need to attain a certain level of common understanding, as "the most important part of the meme is its virality," and without such popularity, "the message won't matter."[41] The acronym produced by those four characteristics (MEME) may be a helpful mnemonic device. Websites like KnowYourMeme offer background details regarding many popular memes.

How is "GIF" pronounced?

In 1987, CompuServe's Steve Wilhite led a computer science team that released what they referred to as a GIF (Graphics Interchange Format). The technology has since changed, but the term stuck around as a way to describe an image file that features a brief animation.

For his contributions to internet culture, Wilhite received a Webby Award for lifetime achievement, and he devoted the entirety of a very brief acceptance speech to settle the debate regarding how to pronounce "GIF." Is it with an emphasis on the "g" as in "gift," or is it more of a "j" sound, like the peanut butter "Jiff"?

Click below and find out…

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://uen.pressbooks.pub/stratcomm/?p=153#oembed-1

Messages that are Made to Stick

It's one thing to understand online culture. It's another thing to contribute to online culture by creating content that goes viral. And it's even more difficult to craft messages that are both popular and enduring.

To go back to our favorite metaphor, we've covered the basics of bottle rockets, and will now turn to building a bonfire. For help on that front, we'll fall back on six basic principles of messages that are built to last.

In the best-selling book *Made to Stick*, Chip and Dan Heath—professors, brothers, and co-authors—outline six characteristics of messages that stick with the audience: simple, unexpected, concrete, credible, emotional, and stories (which they refer to as the SUCCESs model).[42] A sticky message has at least one of those qualities, and messages that are "stickier" tend to feature two or more of those qualities.

> *"Sticky ideas draw from a common set of traits, which make them more likely to succeed.*
>
> *"It's like discussing the attributes of a great basketball player. You can be pretty sure that any great player has some subset of traits like height, speed, agility, power, and court sense. But you don't need all these traits in order to be great. Some great guards are 5 feet 10 and scrawny. And having all the traits doesn't guarantee greatness: No doubt there are plenty of slow, clumsy 7-footers.*
>
> *"It's clear, though, that if you're on the neighborhood court, choosing your team from among strangers, you should probably take a gamble on the 7-foot dude.*
>
> *"Ideas work in much the same way … As we pored over hundreds of sticky ideas, we saw, over and over, the same six principles at work."*
>
> —Chip & Dan Heath[43]

Simple describes how something is simple and profound. The challenge is to find "the core" of an idea, and — not "dumb it down," but distill it down to its essence. It's the key message you want to convey. It should be concise and memorable, similar to the discussion of taglines in Chapter 7. Proverbs like "Don't judge a book by its cover," or "The grass is always greener on the other side" have stuck around for hundreds of years because they are succinct, easily remembered, and impart a larger truth. As Heath & Heath put it, "Simple = Core + Compact."[44]

When something is **unexpected**, it violates our expectations. A cheap version of this is to surprise someone — think of a jump scare in a movie or video game. A more enduring iteration of the unexpected involves arousing someone's interest and curiosity. When something is unexpected, it can compel someone to pay attention.

Concrete is the opposite of an abstract idea. Mission and vision statements are often filled with abstract thoughts that sound nice for a moment and are forgotten as quickly as they were read. Ideas should be absolutely clear and explained "in terms of sensory information" as that is "the only way to ensure that our idea will mean the same thing to everyone in our audience."[45] Concrete messages help audiences to understand and remember.

Credible messages are believable. Sometimes authority, status, or expertise can provide credibility on a topic—like on a projected path of a hurricane, for example. For many other things, however, credibility is a matter of *honesty* and *trustworthiness*.[46] If a person or brand is perceived as telling the truth, and has the appearance of being a reliable source, they are viewed as credible, regardless of their authority, status, or expertise on the matter. Of course, this also explains why some brands lean on influencers for messaging, while others may rely on vivid details or statistics to enhance their own credibility. Credible messages help audiences to believe and agree.

A message must have an **emotional** component, as people tend to only care about a message if they feel something from it. (*Be sure to read the interview with Dan Heath in the next section, especially the portion in which he discusses "the rider and the elephant."*) Emotional messages enhance the likelihood someone will care. Using statistics, which may enhance credibility, activates the analytical part of our brains, making it less likely the target audience will feel a sense of emotion.

Those emotions have to resonate with the target audience, too. Texas had a littering problem, and found that "Please don't litter" signs didn't work, because "the typical litterer in Texas was an 18- to 35-year-old, pickup-driving male who liked sports and country music" and didn't care for most emotional appeals.[47] What followed was an immensely successful campaign: "Don't mess with Texas." And rather than a host of random celebrities, the state partnered with famous Texans including members of the Dallas Cowboys, guitarist Stevie Ray Vaughan, and actor Matthew McConaughey. The campaign worked, not only in terms of recall, but also in curbing littering throughout the state.[48]

The importance of **stories** has been discussed throughout the text, notably in the Brand Storytelling chapter. A good story contains many of the other elements of stickiness. The moral of a story may be simple. Many stories feature unexpected elements or plot twists. They often involve vivid, concrete descriptions of people, places, and events. They can conjure up emotions in the storyteller as well as the listener. Stories and storytelling are often what cause people to act.

Experts Talk Back:

Three questions with Dan Heath, New York Times best-selling author and Senior Fellow at the Center for the Advancement of Social Entrepreneurship at Duke University.

Dan and his brother Chip co-authored *Made to Stick*, which has been translated into dozens of languages, made several "best of" lists, and was named one of the top 100 business books of all time

Q: I did want to talk a little bit about social media. Made to Stick was published in 2007, and so YouTube was a year or two old, and that was the last year where MySpace was still more popular than Facebook. I took the liberty of teaching my students that social media platforms change a lot more quickly than human nature, and so the six concepts are still valid — full stop.

But at the same time, the way in which people communicate has changed pretty radically pretty quickly. So, I'm curious if you feel that the concepts of Made to Stick are universal and enduring, or has the advent of social media changed the way in which you think of some of those concepts? And a second part to that question would be if you feel that any of the six characteristics have become more or less important in the years that have come and gone since then.[49]

Not really, to be honest. For better and worse, it was designed to be an evergreen book. It was designed to be a set of observations about what makes ideas sticky that is independent of the content of those messages, and is independent of the vessel or format of those messages.

I think social media has changed a lot of things. It certainly pioneered new vessels for communication. It certainly has a lot of psychological ramifications, like the addictive aspects and the arms race for attention. But in terms of "How do you make a message stick?" I'm not really sure anything has changed.

And a corollary matter is: I'm not really sure how much of social media is intended to stick in the way that we mean it in the book. Like, you watch a great TikTok—a new dance craze—and it's awesome. It holds your attention. It's entertaining. But three months later, are you really thinking—I mean, you might recall having seen it if someone mentioned it to you, but it's not really a vessel of persuasion or influence—it's just entertainment. Or if your cousin posts a picture of himself or herself in Cairo, you might enjoy seeing that, but it doesn't really mean it's a sticky message. The point being that it's not like I believe *Made to Stick* explains or corralled all of social media. I just think that making messages stick is a subset of all the different reasons why people communicate.

And for the second question, I think the one trait where I sense a real difference is unexpectedness—that, and maybe emotion for the same reason. I think that so much of social media is about those two, especially with everyone's desire to go viral. There's a kind of arms race that happens where what was surprising 20 years ago might be less surprising in the era of TikTok when everything is dramatic and special, and 30 seconds born from six weeks of hard work. And there is an arms race aspect to that. And it's not saying unexpectedness is unimportant, it's saying it's harder to become unexpected because of the competition.

And I think that emotion has a similar flavor where we've had our emotions manipulated in so many different ways. Political stuff is heavy on appeals to anger and tribal responses, and there's certainly a lot of heartstring-pulling from social causes, and that, too, can have a numbing effect with time. So, I don't know exactly what that means for communicators, other than it probably means it's harder in a public, competitive message environment like social media or advertising.

I'm really not sure it's changed that much on others, though. In the classroom, I'm not sure really anything meaningful has changed in 20 years in terms of—if I could be a teacher's co-pilot, I'm not sure my advice to them would be different than it was 20 years ago. It's just a function of the competition, perhaps.

Q: From a Strategic Communication perspective, what concepts from your other texts do you feel are particularly important—given the media landscape today and how people communicate—that students should be made aware of?

One of the major themes throughout our books is change, and how do you create change against all odds? That's a sub-theme in *Made to Stick*, and it's the master theme in some of our other books like *Switch*. The importance of emotion as a necessary element of communication is something that pops up in our other books, especially *Switch*, and *The Power of Moments*.

In *Switch*, we get into this distinction between what we call "The Rider and The Elephant," coined by Jonathan Hite, and it's a metaphor for the two independent systems in our brains that psychologists call the rational system and the emotional system. Let me back up one stage …

I think we've all had this experience in life where we know what the right thing to do is: We shouldn't smoke; we shouldn't binge on Oreos; we should have that hard conversation with our partner; we should stand up for ourselves with the boss—and then we don't do any of that.

And so, it's kind of a puzzle that we live in these brains where we often believe two things at once. Like, I believe I should not eat the Oreos even as I am eating them. Psychologists explain that it's because of the two systems that we have this rational system that's good at planning and pontificating and analyzing, and then we have this emotional system that is more visceral and more auto-pilot oriented that can easily dismiss the fancy thinking of the rational system.

So anyway, Jonathan Hite coined the analogy of The Rider and The Elephant to capture those two systems where the elephant is a powerful emotional system. And then the rider is the little rational system that sits on its back. And the significance of the analogy is that when those two disagree about a direction, you can predict who's going to win that tug of war, and I think that analogy is really important for change, especially in corporations and organizations.

Because so often in organizations when we want people to do something different, we come at them with analysis, memos, charts and graphs, and financial models and so forth. And all of that stuff may be convincing to the rider in the analogy, but meanwhile, there's an elephant in the brain of every person we're trying to reach and recruit to our side that is pretty comfortable with the way things were working last week. So, one of the big themes in *Switch* is that if we want change, we have to motivate the elephant, which requires a very different kind of communication. And that's a direct point of overlap with the emotion chapter from *Made to Stick*.

In many ways, the messages are similar in that there needs to be a heart of a message — there needs to be some emotion that provides the fuel for why I should go through the effort of understanding or remembering what you're saying if it sparks no discernible emotional response whatsoever. And the emotion can be different. You might be fascinated or you might be depressed or you might be angry, or you might be excited or you might be curious — there's lots of emotions in the world. But the point is, if we don't know the answer to the question of why—"Why is this worth bothering to remember and to ponder?" then we need to go back to the drawing board.

Q: What advice would you have for an undergraduate who will graduate in the next few years and enter the field of Public Relations and Strategic Communication?

If I had one piece of advice for anyone in a communication role, it would be to tell stories—full stop.

Stories have this beautiful quality where they encompass almost all of the other traits of sticky ideas. Stories have at least a relative simplicity. Stories almost always have an unexpected component—there's a plot twist or a surprise. Stories are concrete by definition: There's real people, or depending on the story, creatures or animals that are doing things that you can imagine or see. They're not always credible, but if they're fantastical, you sort of go along with the rules of that world. But as a story, you tell the story of a particular citizen who's struggling with something in the real world as a way of shedding light on a political issue. Stories have emotion—they make us feel things.

So when in doubt, tell a story.

Summary: Putting it all Together

The task for practitioners is to capture someone's attention by crafting messages that will be remembered and acted upon—that's it.

Of course, it's easier said than done.

The ideas mentioned in the fun and games sections may be appropriate as tactics to convey those messages, but only as part of a larger strategy.

There must first be a solid understanding of the client and audience, and the situation in which the client finds itself. From there, messages should be constructed with purpose, and in a way that exemplifies the principles of simplicity, unexpectedness, concreteness, credibility, emotion, and stories.

That's a strategic approach to message development.

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10.

PITCHING

Nathan J. Rodriguez, Ph.D.

"Pitching is the bedrock of PR. Not everybody is good at it. But if you are, your career trajectory will be limitless."
–Ed Zitron[1]

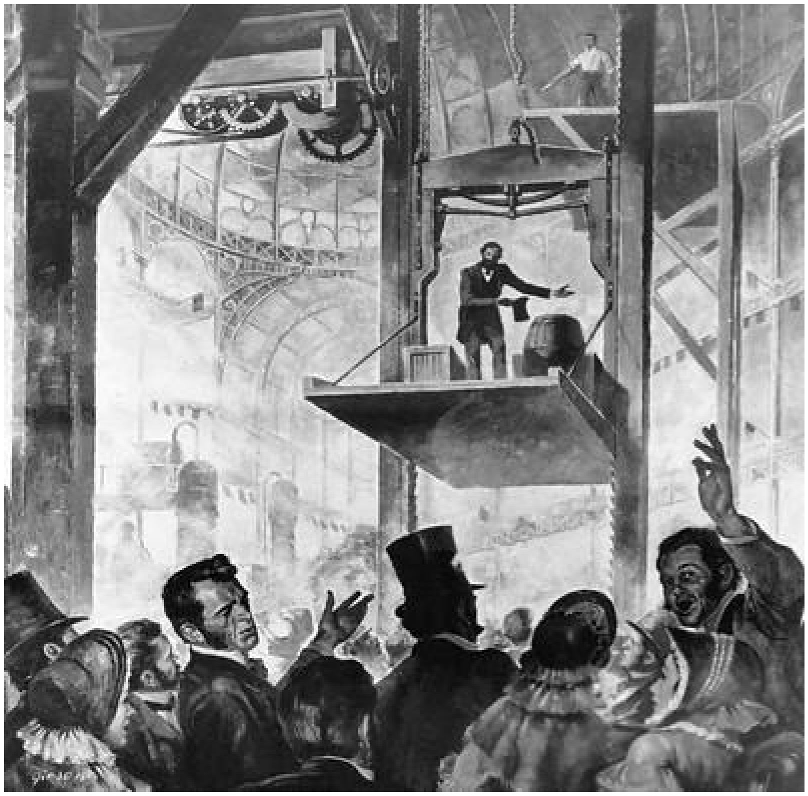
"Everybody walks past a thousand story ideas every day.
The good writers are the ones who see five or six of them.
Most people don't see any."
—Orson Scott Card[2]

First, a Story…

Elisha Otis stood on a platform nearly 50 feet above a crowd of onlookers at the 1854 World's Fair in New York.[3]

The platform was held up by a single rope. Otis ordered his assistant to cut the rope.

The assistant swung the ax and cut the rope. The audience gasped as the platform fell.



Elisha Otis surprised the audience with the first "elevator pitch." "LII018: Figure 5.1" by Rosenfeld Media is licensed under CC BY 2.0.

To the surprise of the crowd, it only dropped a few inches. He reassured the audience: "All safe…all safe."[4]

Otis had effectively introduced the first safety brake on an elevator, and he did it with a brief and dramatic demonstration. In doing so, he both literally and figuratively delivered the first elevator pitch.[5]

Before that fateful day, elevators were generally avoided because they were considered dangerous, and rightfully so. The pulley system in place relied on a single hemp rope, and those ropes would snap, sending the elevator and its occupants in a virtual free-fall down the shaft.[6] The invention saved scores of lives and made modern-day skyscrapers possible. Today, Otis is the world's oldest and largest elevator company, and is said to carry the equivalent of the entire population of the world every five days.[7]

To be fair, Elisha Otis was simply trying to convey the effectiveness of his new safety mechanism, amid much fanfare. More than 100 years after that demonstration, businessman Philip Crosby authored the second edition of his book, "The Art of Getting Your Own Sweet Way," in which he is credited as coining the term "elevator speech" as we know it today. Crosby framed it as an opportunity to deliver an "all-encompassing, action-producing set of ideas that you pronounce while on the elevator with the big boss for just one minute."[8]

The Takeaway

Over the last few decades, the term "elevator pitch" has risen in prominence, relative to "elevator speech," but the terms are otherwise fundamentally interchangeable. The emphasis is on gaining someone's interest and conveying information succinctly.

In many cases today, elevator pitches don't happen in elevators. But at least one venture capital firm went so far as to build an actual "pitch room" inside an elevator at their office, and because the building is just three stories; they can practice pitching quickly.[9]

Although it originated from the minds of Otis, and later Crosby, the elevator pitch has entered the popular vernacular of the corporate world, and remains an indispensable tool in a world where time and attention are more limited than ever.

Introduction to Pitching

You've pitched ideas before, whether you realize it or not.

Ever suggest a restaurant to a friend, family member, or romantic interest? That's a pitch.

Pitching is fundamental to the practice of Public Relations and Strategic Communication. It's been referred to as part of the "Triple Crown of Public Relations" alongside news releases and feature articles,[10] and some practitioners consider it the most important skill.[11]

Why?

Because large portions of your work life will likely be spent pitching ideas to colleagues, clients, partners, and members of the media. To be sure, the more you pitch, the better you'll become. In the meantime, though, it's worth learning from the successes and failures of practitioners to understand approaches that tend to work and why.

What We'll Cover:

- ★ Importance of Pitching
- ★ General Best Practices
- ★ Virtual Pitching

- ★ In-Person Pitching
- ★ Pitching Potential Partners & Clients
- ★ Pitching the Media

How We Got Here: "The Wind-Up" and The Pitch

Pitching is everywhere. In many industries, pitching has become "the default approach of business, even for smaller projects."[12]

That's not necessarily viewed as a positive development, as the prevalence of pitches can feel overwhelming. Across the pond, our friends in Europe have gone so far as to craft a "Pitch Positive Pledge" for agencies and advertisers that asks signatories to (1) be sure a pitch is required, (2) consider the implications of a pitch for all parties involved, and (3) provide and/or accept feedback following a pitch.[13] The pledge was launched by European advertising bodies and has hundreds of signatories.

Pitching is easy to understand but difficult to master. Like most of Public Relations and Strategic Communication, it's part art and part science. If you pitch something inherently newsworthy, consider yourself fortunate because the pitch doesn't necessarily need to be perfect to achieve your desired outcome. But if there's no real angle to your pitch, all the tricks in the book and your (presumably substantial) charisma won't get you there, and it's a waste of everyone's time. There's a lot of gray area between those two extremes, however, and that's where many practitioners find themselves most of the time.

The ultimate goal of pitching is to "get in and get out as quickly as you can with the result you want."[14] But prioritizing relationships means you'll need to accept a firm "no" or silence as a response in some cases.

Best Practices: Before, During & After the Pitch

You'll pitch virtually and in-person, and to different audiences.

Regardless of the context, practitioners, and members of the media generally agree upon what works and what doesn't. In a broad sense, three principles should be followed before, during, and after a pitch.

1. Before the Pitch: Put in the Work

Ignorance can be deafening, particularly when it masquerades as certainty. Few things are more annoying than an overzealous PR practitioner who is deeply self-centered and has no idea what they're talking about.

In many cases, conducting due diligence requires minutes of your time rather than days and weeks—but those few minutes may make all the difference. Don't let your ego convince you otherwise. When you don't do your homework, you rely on instinct rather than strategy. Professionals understand that "Fools rush in where angels fear to tread."[15]

So, eat those metaphorical vegetables and do your homework. Read constantly, and keep up with relevant articles, blogs, and trade publications. A baseline understanding of your industry can go a long way, especially when you're new, because you'll know your stuff.

Remember you're dealing with other professionals who have goals of their own. Invest in those relationships, and avoid viewing interactions as transactional, where the other party is merely a means to an end. Understand what they've done and what they're doing. To do that, follow them, listen to them, and interact with them as human beings rather than constantly badgering them about what you want.[16] This is a basic step that beginners tend to leap over when they're hyper-focused on the end result.

If you're in it for the long haul, recognize the truth in the cliché about life being "a marathon rather than a sprint." Take advantage of opportunities to meet people and get to know them. Take time to celebrate and amplify their work. Help them even when it doesn't help you directly. In addition to the benefit of simply being a good human, Cialdini's theory of reciprocity reminds us that creating relationships makes it more likely that they'll pay attention the next time you approach them with an idea.

2. During the Pitch: Personalize the Approach

Persuasion is pitching, and pitching is persuasion. A key distinction is that persuasion can take various forms, while pitching involves interpersonal interactions. Some of the takeaways from the chapters on ethics and relationship management are also relevant to our interests here.

> *"Pitching is simply learning how words relate to people —*
> *what makes sense in a particular moment,*
> *what connects to a person*
> *and their own personal story*
> *versus what makes somebody walk away*
> *and wish you were dead." —Ed Zitron*

If you've followed the first principle and put in the work on the front end, personalizing your pitch becomes easier because you know your audience. More importantly, you *know the audience of your audience.* That helps when you're trying to craft an effective hook.

The best pitches are concise and precise. There's no fluff and no jargon. They demonstrate respect for the recipient's time and intelligence.

The subtext, or what's left unsaid, is essentially "*You're smart; I'm smart. I found this intriguing, and thought you and your audience might, too.*"

3. After the Pitch: Follow Up Appropriately

If your pitch was an instant success, this step may not be necessary, as you'll hear back.

But people are busy, and there's only so much time in the day, which means you'll often want to follow up on your pitch.

You might have mentioned a timeframe in your pitch, and if that's the case, abide by that. The appropriate follow-up time depends on how time-sensitive your request is: If it requires a quick turnaround, it's reasonable to follow up in two days or less; if it's less time-bound, then you could allow up to a week before following up.[17]

Above all, demonstrate respect for their time and attention. Don't pester them on a Friday afternoon, and don't "circle back" ad *nauseum*. In general, a single follow-up is fine, though on occasion you could consider following up a second time.[18] After that, you'll just have to let it go. Live to pitch another day.

Virtual Pitching

The vast majority of pitching is done virtually, primarily through email.

Avoid the use of all-caps, which is the email equivalent of raising your voice. As Desmond Tutu reminds us, "Don't raise your voice; improve your argument." Don't use all-caps; improve your pitch.

It's best to approach the subject line as you would a headline in a news release or article.[19]

There's a fine line between being creative enough to grab someone's attention, and having a subject line that comes across as gimmicky clickbait. Avoid generic descriptors such as "story idea" or "cool upcoming event," since those could be used to describe many pitches, and the hope is to break through the noise.[20]

The proper length of a subject line is an open debate. Some claim concise subject lines of 16 characters or fewer result in higher open rates.[21] Others claim that subject lines with six to 10 words result in the highest open rates.[22] And still others claim that lengthy subject lines with more than 60 characters produce the best results. One last consideration is that many emails are now read on mobile devices, so keeping it to 40 characters or less will prevent the subject line from being truncated.

Where does that leave us?

Some of the most compelling studies suggest the length of a subject line is irrelevant as to whether it gets opened or not.[23] By the time we account for variables ranging from the particular industry to the recipient's familiarity with the sender, and even the time of day, it becomes difficult to assign much credit or blame to too many or too few characters in the subject line.

Put another way, subject line length probably doesn't matter because the content of the subject line matters most.

This may seem like a lot to consider for a subject line, but the open rates for pitches is quite low. Estimates are that an open rate of 15-25% is considered "good" in most industries. If you can't get someone to open your email, the pitch itself becomes irrelevant.

As with any good news story, the opening line of a successful pitch has to be compelling without being corny.

It shouldn't feel like a sales pitch or spam. This can be accomplished by personalizing the pitch in a way that meets the recipient's needs. You'll want to include your best content here with a statement that is original, concise, and compelling.[24]

After the opening line, offer additional details that convey why your proposal would be a good fit. End with potential next steps or a scheduled follow-up, and thank them for their time.[25]

It's not essential to relay every single detail on this first outreach attempt, and is therefore advisable to keep the body of the email to 200 words or less.[26]

In-Person Pitching

Similar to virtual pitches, you ideally won't "go in cold," and will have connected with your target audience at some point in the past.[27]

Unlike virtual pitches, the duration of an in-person pitch varies.

The old adage that "time is money"[28] remains an operating principle for most business-related interactions.

More often than not, especially if there's a power imbalance, you might have just 15 seconds[29] or some say 10 words or less[30] to get your point across in an elevator pitch. At the other end of the spectrum, typically when there's a lot at stake for an organization, you may have the floor for dozens of minutes.

Tactical Tip: Use Your Voice

Think of a captivating speaker you've listened to. Or an actor from your favorite movie scene.

What made them so special? It's one thing to have great ideas and content, and another to convey that effectively. To improve your delivery, focus on "The Four P's" of voice training: pause, pitch, pace, and projection.[31]

1. **Pause** – As Mark Twain put it, "No word was ever as effective as a rightly timed pause."[32] Strategically, it's advisable to pause before or after a key point or phrase. But it's also important to understand the context and your audience. As Twain said, "For one audience, the pause will be short; for another a little longer; for another a shade longer still; the performer must vary the length of the pause to suit the shades of difference between audiences…I used to play with the pause as other children play with a toy."[33] *Life lesson: Find someone who loves you as much as Mark Twain loves a pause in speech.*
2. **Pitch** – In this chapter about pitching, here's a curveball. With respect to using your voice, pitch is the relative highness or lowness of a tone as perceived by the ear. Good speakers tend to vary their vocal pitch for emphasis, which helps maintain the interest of the listener.
3. **Pace** – A good presenter knows to speed up and slow down for emphasis. The rationale for adjusting the pace mirrors that of the pause. If you're leading up to a key phrase in your presentation, or a punch-line to a joke, mix up your pace and you'll be more likely to "stick the landing."
4. **Projection** – The entire audience needs to be able to hear you, so project your voice. With that caveat, softening your voice for emphasis can be effective. Playing with that dynamic range is another effective way to generate interest.

Some add a fifth "P," which is **Personality**. In some ways, personality could be seen as an amalgam of pause, pitch, pace and projection. It has also been defined as "the color, warmth, and meaning that comes from hearing your voice," and it can range from "passionate, to bored, to serious, to light."[34]

Whether your pitch is brief or lengthy, considering word choice and body language can help create a desired impression.

With respect to word choice, use vivid imagery that tells a story and creates a mental image.

This has been called "The Scorsese Principle,"[35] in reference to a famous scene from Martin Scorsese's film *Goodfellas* in which the protagonist talks about preparing gourmet meals in prison:

> In prison, dinner was always a big thing. We had a pasta course and then we had meat or fish. Paulie did the prep work. He was doing a year for contempt, and he had this wonderful system for doing the

garlic. He used a razor, and he used to slice it so thin that he used to liquefy in the pan with just a little oil. It was a very good system.[36]

By painting a picture for the listener, your ideas become more compelling and memorable. Consider what you want to convey and then illustrate the idea.

Tactical Tip: Avoid Verbal Tailgating

When you're pitching something, it's natural to feel excited and nervous.

When you feel excited and nervous, it's natural to speak a little more rapidly.

If you think of your brain and mouth as vehicles on the highway, hopefully the brain is a safe distance ahead of our mouth, because that's just better for all parties involved. Put another way, "The more slowly you drive…your mouth…the more time you give your brain to carefully decide where the mouth is going to go next."[37]

But if your brain and mouth are both racing down the highway at 80 miles per hour with little separating them, that's when you need to watch out. With this "verbal tailgating," we don't allow ourselves the luxury of making thoughtful decisions, as "the brain is forced into choosing the first direction or thought rather than the best one."[38]

You have the power to avoid verbal accidents. The more doubt or uncertainty you have about a given situation, the slower you should go.

There's also the matter of body language.

You might have heard that 93% of all communication is nonverbal.[39] It's a figure that appeared in communication textbooks for decades, but more recently, academics have characterized that number as "an urban legend."[40] That's not to suggest nonverbals don't matter. The best evidence we have today suggests that up to 30% of all communication is verbal, and 70% is nonverbal.[41]

Remember all those tips you learned in your public speaking class? You're gonna need 'em.

If you are able to, stand upright with your torso facing the person you're trying to persuade.[42]

Use eye contact to establish a connection between you and the audience, and use gestures that are appropriate for the context.

Above all else, whether you're actually speaking to one person or a room full of people, the trick is to speak as though you're talking to a single person.

Pitching Prospective Clients & Partners

Pitching a client is essentially a "group job interview"[43] where you demonstrate that your expertise would be a good fit for their communication needs.

We'll address PR proposals in an upcoming chapter, but there you're trying to sell your team, and a common vision of what a client is, and can be. You'll have done research so that you're pitching in a way that's responsive to their needs. You'll leverage your knowledge of the competitive landscape to find solutions that work.

Having an impressive track record and portfolio helps. That portfolio may include speculative work, or "spec pieces," that aren't created for use by a client, but to demonstrate your own proficiency at producing quality work. Early on, your portfolio may be limited and even unimpressive, but with more experience and feedback, it will become an asset.

Tactical Tip: Sounding Good in Meetings

Whether you're answering a question or speaking up in a meeting, there's pressure to perform well.

To avoid a meandering, improvised word salad, consider the following three questions before you speak:

1. What's my point?
2. How will I illustrate it (an example, a story, or data)?
3. What are the first five words out of my mouth?[44]

Some people love the sound of their own voice, and that's fine. But with a little practice, deploying this three-part strategy can go a long way to conveying ideas effectively. So keep them in mind the next time you're going to open that big yapper.

When pitching a potential business partner, the same principles apply. You're still trying to sell a common vision.

A primary consideration, whether it's a potential sponsor, influencer (a.k.a. content creator), or any other business partner, is fit. The stylistic fit between an individual and a brand has been referred to by academics as "the match-up hypothesis," as well as "congruence," "congruency," "match-up," "fit," and "match" for decades, and despite little agreement on what it should be called, fit is generally viewed as "the primary factor in the success" of an endorsement or partnership.[45]

In the social media realm, it helps to locate the influencers and content creators who fit with your goals. This doesn't necessarily mean sliding into the DM's of a celebrity with millions of followers with a pitch. Many organizations find that so-called micro-influencers (with several thousand, and even tens of thousands of followers) and nano-influencers (with fewer than 5,000 followers) often have more loyal followers, and are viewed as more authentic than larger accounts. Seek out those who have high engagement rates and occupy a similar space.[46]

Experts Talk Back:

Three Questions with Mayren Rancifer, Communications Strategist at We Defend Truth.

We Defend Truth is a national nonprofit dedicated to combating political misinformation. The organization inhabits online spaces, and its content has gone viral, racking up tens of millions of views.

Q: You've been busy since you graduated college just a couple of years ago, working for United States Sen. Jon Ossoff's campaign in Georgia among other things. Tell us a little about your career path and what you've been up to.

Prior to the pandemic, I was volunteering on a presidential campaign, and I started a group at Weber State for Pete Buttigieg, targeting young voters. And I traveled out of state caucusing for him, and I actually got to meet him and his husband. It was awesome.

And then the pandemic happened and the world as we knew it went to shit (laughs).

So I moved to Georgia that spring and sent an email to Ossoff's campaign team saying 'Hey, I'd like to volunteer, but also if you're looking for any staff members, here's my resumé.' This was in April, and I didn't hear back from them until September. So that was kind of a shot in the dark, but his press secretary emailed me and said they were looking for a press assistant, and they had my resumé on file, and was I still interested?

And I was like, 'Oh my God.'

But I went into it super doe-eyed. I didn't realize how fast-paced and crazy actual federal campaigns were…but it really taught me to just dive into the more traditional aspect of comms, [things like] the press releases, the media contacts, pitching him and trying to get interviews.

I did move to Texas right before the election, and so once that concluded and we won. The high of winning a campaign like that does not leave you. Especially during 2020, since that was such an insane year.

But a couple months later, I hopped on a mayoral race in Boston. It was remote. But I took with me the skills I had picked up, and it was a small but mighty communications team, so I was forced to build a communications strategy from the ground up, including digital as well. I did that, and then some freelance work for a while, and now I'm working for a nonprofit called We Defend Truth, which was founded by this amazing, incredible woman who actually ran for DNC Chair in 2017, she's a political analyst on Fox News, and we're debunking conspiracies: like the election being fake, and all that.

Q: In working on the Ossoff campaign and pitching him to members of the media, did you find that you had to tailor it for a specific outlet, or were you framing it in a similar way to different outlets? Were there some tactics that were helpful? Or did it even matter because you had Jon Ossoff, (laughs) who was going to be pretty sought-after?

Well, there was that (laughs), because it was such a highly contested race.

But for certain news outlets and certain local towns in Georgia, where his message was targeting people in that area, so, for example, there were some more rural areas, and one of the big talking points was a bunch of local hospitals shutting down, and rural voters not having access to health care, so with situations like that, where there's a specific community issue that he was addressing with his campaign, then I might use that.

But mostly it helped out that it was Jon Ossoff (laughs)...But I felt like a freaking salesman (laughs). Because I'm sending emails and then a few days later I'd send a follow-up email, and then a few days later I'd give them a call like "Hey, just wanted to make sure you got my email."

And one thing I wasn't expecting to do is: After we send out press releases for local events and whatever else, at the butt-crack of dawn the next day, or the day of the event, we would call the newsrooms because usually the way it works is we'd send the press our media advisories and news releases to the actual news channels. So I'd call their newsroom before their morning people got in, and would be like "Hey, just wanted to make sure you guys got this press release from last night. Are you guys going to RSVP?" And they'd be like "Oh, let me check to see if we got that," and so we'd get an answer rather than just sending that out.

Q: What advice would you have for students who are just graduating and want to get

into Strategic Communication and Public Relations? What skills do you think would be useful to them to have, and what sort of advice would you have

I feel like no matter what, people are going to leave school and unless you start at a super entry-level job where you have someone coaching and guiding you to the next position, you kind of just get thrown to the wolves. And that sucks, and it's stressful, but at the same time, you'll come out as a much better person and communicator. So be prepared for anything!

I think the biggest thing, no matter what aspect of communications you're in, writing is a huge thing. So, making sure that you never lose that knack for writing.

And I think one thing I've learned that has humbled me a few times is you have to always be willing to learn new things. Because especially now, communications are ever-evolving. For example, even since 2020, TikTok has emerged. So there's all kinds of things that you learn in school, you learned about press releases, and this and that, but nothing really prepares you for what it's like in the real world. And in the real world, it's just always changing. You just always have to be willing to learn something new.

So, adaptability and you have to love to write.

One thing that's really helpful both in the classroom and outside of it is working in a group. Because very rarely—unless you're doing freelance stuff, or whatever—you're never truly working alone. So, getting in a group, writing something, and getting as many eyes on it as you can is one thing that was really helpful in intro to PR and campaigns classes. But it also applies to the real world because I'll spend *hours* on something, and send it on up saying "Hey, let me know what you think." And then I'll get back an email with all these suggestions and edits, and you kind of just have to take it.

Pitching Members of the Media

Members of the news media were the original content creators: Show some respect!

To be an effective practitioner, you'll have to develop a good working relationship with members of the media. Sure, you can create your own content, but it generally won't travel as far. Studies show that journalist content generates twice as much awareness and amplification overall, and nearly three times as much engagement as non-journalist content.[47]

To give yourself a sporting chance, you must understand what a journalist's day is like, the types of stories they might be interested in, and how you can bring value to their work.

For starters, members of the media are generally overworked and underpaid. The mantra in newsrooms for decades now has been to "do more with less." They have to create new content all the time—and the demand for new stories doesn't stop.

That's where you come in.

To be fair, that's also where every other PR practitioner comes in, and for each member of the media, there are six PR professionals.[48] So each and every day, journalists have an inbox full of pitches, news releases, invitations and unsolicited feedback, and the pressure of multiple deadlines looming overhead. Your goal is to make yourself as helpful and useful as possible.

> *"An amateur can bring a good story to the average newspaper office and receive consideration, although the amateur is only too likely to miss precisely those features of [their] story which give it news value, and to overlook precisely that element…which will make it interesting to the particular newspaper [they are] approaching."*
>
> —Edward Bernays, *Crystallizing Public Opinion*, 1923.

Pitching is tough! One informal poll of PR practitioners in 2022 found that 37% of respondents thought that "outreach" was the most difficult aspect of PR, second only to campaign ideation at 43%.

Journalists understand you have a job to do, and despite their likely misgivings about PR as a profession, they also recognize you have the ability to make their job a little easier. So don't flood their inbox with poorly thought-out ideas. Multiple studies have shown that the biggest reported pet peeve for two-thirds of journalists is "repeated spam" from PR practitioners via phone and email.[49]

In terms of how and when to reach out, surveys show that more than 90% of journalists prefer pitches via email, and two-thirds prefer to receive those emails before 11 a.m.[50]

Determining what to pitch requires a working knowledge of what constitutes newsworthiness—not just to the writer or editor, but to the audience they'll be writing for.[51] A successful pitch explains the benefit to that particular audience—rather than broadly asserting it's a "good story idea." To do that, study the stories they've written. Look at who they follow online, and how they interact with others on social media. You may find a natural entry point for a conversation, which is better than a cold pitch attempt.

Just about anything is preferable to a cold pitch attempt, so your first outreach attempt could also be on something where you lend expertise on an issue, or even recommend others to speak on a particular topic. If you offer the former, be sure you're able to provide a new perspective. If you offer the latter, be sure to indicate the credentials of a particular source and the potential insight they may offer. In that way, you're positioning yourself as a trusted resource for a journalist.[52]

Journalists are most interested in sources that can communicate clear, short messages. They need to be credible in the field as well as reliable. And hopefully they're articulate enough to convey useful information in a way that will adapt to the journalist's need for "simplicity, clarity, and dramatization."[53]

It's possible to be proactive on this front as well. The website "HelpAReporter.com" (HARO) connects journalists with sources. Offer your services there if you find a good fit. And take a look at social as well. One popular hashtag used by journalists when they're looking for sources for a particular story is #journorequest. Other common keywords are "prrequest," "bloggerswanted," "bloggerrequired," and "bloggerrequest." So don't just sit there and wait for something good to happen: Make yourself useful.

You also build trust by being a professional, which means you respect "no" as an answer. You should respond promptly, even when the news is bad, to demonstrate respect for their deadlines, and to be transparent about your agenda.[54] That shows them you're a serious professional, and not just another PR hack nagging them for coverage.

Story Types

If you've taken a journalism course, you're familiar with the general elements of newsworthiness. You also know the difference between hard news and a human-interest story. You know that stories that have a timely angle or hit close to home for a target audience are particularly newsworthy. And, of course, you know stories that are a bit odd or unusual tend to get clicks online.

Ideally, your pitch offers more than one angle to a potential story, as that makes it more likely to pique the interest of a journalist.

So to work on those angles a bit, a few generic "types" of stories are the company story, company news, and a trend piece.

The **Company Story** essentially argues "X Company is the Y for Z."[55] People tend to evaluate something new in terms of something that's already known. So if we were to describe the app Hipcamp, which allows campers to reserve spaces on private property, our angle might be that "Hipcamp is Airbnb for campers."

Company News is precisely what it sounds like: News about the company. A basic way of looking at it is "X company launches Y."[56] It could be anything from a new product or service, to a new executive at the company, to new funding. In other words, there's a "hard news" angle to it, and you want to share that development.

A **Trend Piece** requires a bit more thought because you need to have a solid grasp of a particular industry. Some of the more common examples may be found when something "goes viral" on social media. Look at the larger trend involved, and see how your client might fit. Ideally, you're "both on trend *and* ahead of the curve" as that's "the best place to be."[57]

Above all else, when you're asking a journalist for something, make sure the ask itself is clear. It's a waste of everyone's time if you craft a "beautiful narrative that places your issue in the center of the world, but never actually gets to the point of why you're writing, calling or tweeting."[58] Remember your focus is on your audience's audience. While you want a journalist to provide you with earned media, they want to provide content to their loyal viewers or readers.

Summary: Putting it All Together

Pitching is concise and targeted persuasion.

You have about 15 seconds or 15 words to capture someone's attention. That's it. So don't just rely on your gut instinct and charm.

Put in the time and perform due diligence to give yourself the best shot at success. Become familiar with your audience's audience.

Personalize your pitch to a single person every time. If you use GAI tools to generate ideas or smooth out phrasing, that's fine—but humanize and personalize the final pitch. Journalists can identify a generic "copy and paste" job from a mile away, since they encounter those every day, and there's no quicker way to wind up on their spam list. Unless, of course, you keep badgering them on a follow-up to your pitch.

None of these concepts and principles are particularly difficult to comprehend, but you'll inevitably find it's more difficult in practice. The more you evaluate the situation from the perspective of a journalist or content creator, the more likely it is you'll experience success. People won't respond sometimes, even when you and your client want them to. That's just part of the business.

Media Attributions

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11.

STRATEGIC WRITING

Nathan J. Rodriguez, Ph.D.

"The two words 'information' and 'communication' are often used interchangeably, but they signify quite different things. Information is giving out; communication is getting through."
—Sydney J. Harris[1]

"Vigorous writing is concise. A sentence should contain no unnecessary words, a paragraph no unnecessary sentences, for the same reason that a drawing should have no unnecessary lines and a machine no unnecessary parts."
—William Strunk, Jr.[2]

First, a Story…

"You don't have an image problem," said advertising executive Willy Hopkins, during his pitch to the leaders of Subaru. "The problem is, you don't *have* an image."[3]

He was right.

Subaru had paltry sales figures compared to its competitors at Toyota, Honda, and Nissan. At this time, in the mid-1990s, the company had tasked various agencies with establishing its brand identity, ranging from larger New York firms like TBWA to smaller, innovative agencies such as Wieden+Kennedy that built a reputation from its work with Nike.

Nothing seemed to work.

The company simply couldn't compete and capture enough of the standard 18-to-35-year-old male demographic that was so sought after by car companies. They built solid, dependable vehicles that were in no way flashy or eye-catching. Subaru was in the middle of a seven-year sales slide, and it needed a different approach or it risked going out of business.[4]

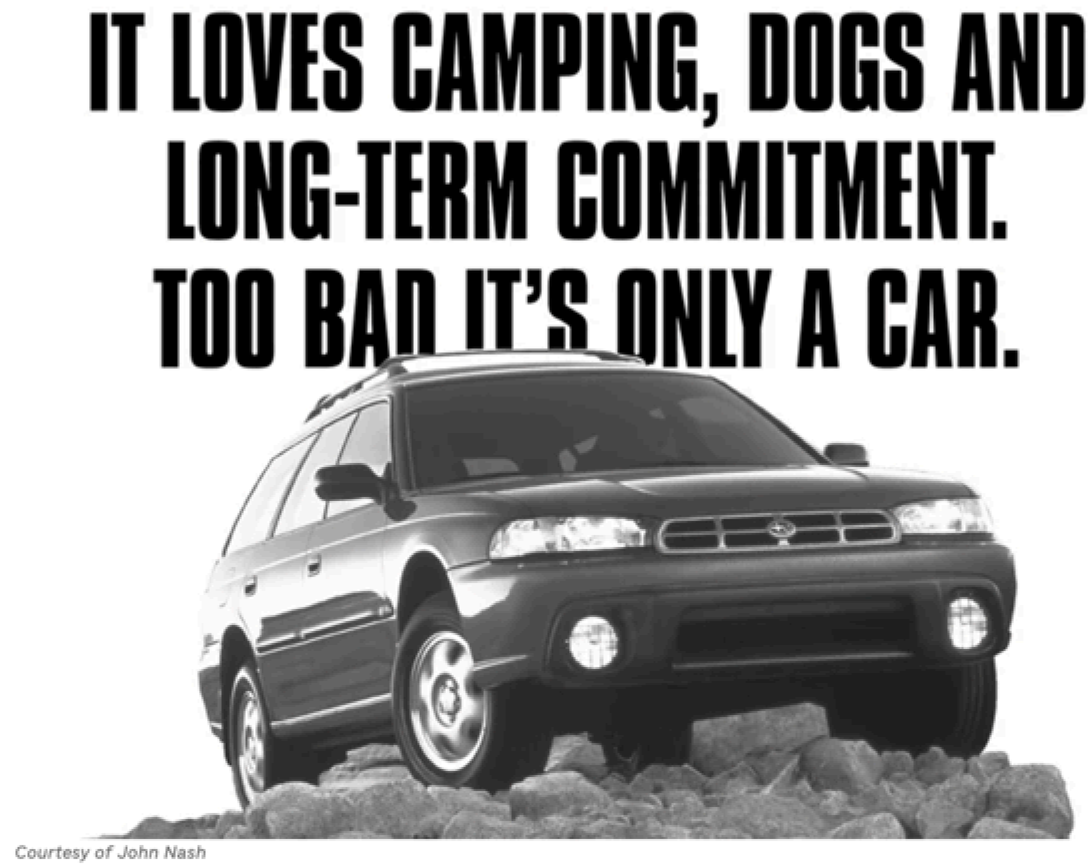
The company identified five groups that were responsible for half of all its sales: teachers and educators, health care professionals, IT professionals, outdoor enthusiasts, and lesbians.[5]

The ad agency Mulryan/Nash clicked through about a half-dozen slides in their presentation before making it clear, in their pitch to executives, that their target audience would be lesbians. This was a bold suggestion in the "Don't Ask, Don't Tell" era of the mid-1990s, when very few celebrities were openly gay.[6] Indeed, when Ellen Degeneres came out as gay in an episode of her sitcom in 1997, the ensuing controversy caused a number of companies, including Chrysler, to pull ads from the show.

Mulryan/Nash recalled a moment of confusion when the Japanese executives from Subaru looked up "gay" in their dictionaries, and "nodded at the idea enthusiastically" because, after all, "Who wouldn't want happy or joyous advertising?"[7]

After some additional clarification and persuasion, Subaru ran with the idea.

The very first ads were overt and plainly directed at the lesbian market, and they were unsuccessful. So, Subaru fine-tuned the strategy, this time using advertising approaches that were playfully coded in a way that may go unnoticed by most of the audience, but would be seen and heard differently by the gay community.[8] In essence, it was an inside joke written for the target audience.



An example of Subaru's use of "playful coding" in its outreach to lesbians during the mid-1990s.

One ad featured two Subarus side-by-side. An Outback with two mountain bikes had a rainbow bumper sticker with the license plate "CAMP OUT" and a Forrester with a kayak strapped to the top had the license plate "XENA LVR," in reference to the *Xena, Warrior Princess* TV series that starred Lucy Lawless as a strong female protagonist.

The company expected some backlash, and conservative groups soon called for a boycott. Subaru believed its drivers were "diverse and well educated," and therefore the core customers wouldn't be offended by the messaging, and they were right. Indeed, research by their marketing team revealed that none of the people who threatened to boycott the company had ever purchased a Subaru.[9]

The ad campaign was one of the very first mainstream media campaigns to reach out to the gay and lesbian community, and it turned things around for the company.[10] Two years after the campaign, Subaru sales finally began to increase, and the company never looked back.

The Takeaway

Today, ads featuring members of the LGBTQ+ community are commonplace. But there are lessons to glean from Subaru's choice to lean into a subset of its core audience.

To be clear, the company didn't solely rely on the gay community. During that time period, it also tailored messages to the other four groups that drove its sales, but the gay market was one of the best for the company. Subaru proved to be ahead of its time and was the only car company to not lose market share during a subsequent recession. By the 2010s, only Tesla grew faster than Subaru.[11]

Subaru found its audience, and it spoke to that audience in a way that felt natural.

It had purposeful messaging embedded in its advertising that differentiated it from the competition.

What We'll Cover:

- ★ Styles: AP, APA, Chicago, Harry[12], MLA
- ★ News Releases: Overview
- ★ Anatomy of a News Release
- ★ Speechwriting
- ★ Social Media
- ★ AI Prompt Engineering
- ★ Tips & Tricks

Style & Terminology

The more formal the writing, the more style and formatting matter.

Various academic disciplines use different styles, among which APA style, MLA style and Chicago style are the most common. The basic idea is that you're writing a research paper and need to find a way to "show your work" and link each claim to a source of information. APA style and MLA style both use in-text citations, while Chicago style advises the use of footnotes or endnotes. When constructing a campaign proposal, perhaps your professor, supervisor or client has a style preference. If they do, go with that, but chances are the typical recipient will be fine with any one of these as long as the basic guidelines are followed.

All public-facing writing should follow AP style. **AP style** references the Associated Press Stylebook that's used for media writing. The stylebook offers specific guidance regarding a range of elements, including capitalization, spelling, and punctuation. It has more than 5,000 entries. Because the way we speak and write is constantly changing, AP Style is constantly changing.

There's a new AP Stylebook and e-book available each spring, and there's no substitute for it. But if you are at least familiar enough with the fundamentals of AP Style, you're generally in good shape. Beyond that, follow AP Stylebook on social media: Its accounts provide daily reminders regarding common word use and updates on changes to previous entries. The Online Writing Lab at Purdue University is an excellent free resource.

News Releases: Overview

This section is lengthy out of necessity. As a practitioner, you'll be expected to know how to write a great news release. At times, it may seem like a lengthy list of "do" and "do-not's", but for a media member to take you seriously, you need to demonstrate your familiarity with the rules of the game.

We'll start with what constitutes a news release, then cover the content and formatting considerations for the header, headline, body and boilerplate. Finally, we'll examine related items such as a media kit, backgrounder, fact sheet, and media alert.

News Releases: What are they?

A **News Release** is a publication-ready article written by an organization that is sent to specific members of the media. Unlike advertising, in which an organization pays a media outlet to run an ad, there's no guarantee of publication, which is why it's also referred to as a type of earned media.

News releases are written by an organization, but are balanced and neutral enough to have the appearance of being written by a media outlet. They blend in with existing content. For the past hundred years, studies consistently suggest that at least half the news articles published in independent media were sourced from, or significantly influenced by, PR practitioners.[13]

News releases are written in AP style. From the perspective of a media writer, the closer something is to being perfectly written in AP style, the better. It makes their jobs easier. When a news release deviates from proper AP style or the release is littered with grammar and usage errors; it creates more work for the recipient and makes it less likely they'll be interested in correcting your mistakes. When in doubt, look it up. When you're 95% sure something is correct, look it up.

Zitron's Rules for News Releases[14]

1. Don't make it longer than 400 words.
2. Don't try to be funny.
3. Proofread it at least twice.
4. Target the right media
5. Have something of value to share

There are a few basic types of news releases. **Announcements** of news and upcoming events tend to be the most common, and are written like a traditional news story. There are also **feature stories** that combine information and entertainment, stories that offer **reactions** to a situation or a local perspective on a broader trend or topic, and **op-ed** (opinion-editorial) **columns**.[15],[16],[17] Knowing the type of release you want to craft is critical to knowing where the story fits in, who to contact, and why it might be of interest to media outlets. *You'll also want to incorporate concepts from the chapters on framing, storytelling, message development, and pitching.*

As a general rule, news releases are sent to individual members of the media via email. That email should include items that eliminate obstacles to publication such as links and attachments for high-resolution images and videos, as well as background information about the company and the contact person. The following section digs into additional details about constructing a news release.

Anatomy of a News Release[18]

News releases are normally distributed via email, but not always. There are occasions where someone expects a PDF or even a paper version of a release. For example, PDF versions of news releases are commonly found on organizational websites. Your own portfolio, assuming it contains a sample news release or two, will have that in PDF form. It's common for employers to ask finalists for a PR-related position to craft a news release.

Email knocks out some of the formatting considerations, but it's critical to first know how to construct a news release in such a way that a seasoned professional could glance at it, and in the matter of just a few seconds, know that you understand the basics. A chef knows their dish will ultimately succeed based on taste, but they also understand the importance of presentation. The same idea regarding first impressions applies here, as folks will absolutely form snap judgments as to whether you're the person for the job.

Because there's a little more that goes into traditional formatting, we'll cover that first. There is not a single agreed-upon method of laying out a news release, but here we'll follow the guidelines first recommended by Marsh, Guth, and Short, as their method is broadly accepted, comprehensive, and visually balanced.[19] With that, it's time for a top-to-bottom description of the key components of a news release: The content and formatting for the header, the headline and body, and boilerplate.

Sample News Release

1

Initech Corporation

123 Maple St. Anytown, UT 84401

News Release 2

FOR IMMEDIATE RELEASE
Aug. 21, 2024

3 **FOR MORE INFORMATION:**
John Smith
Marketing Manager
(801) 777-7777
johnsmith@email.com

4 **Initech to launch new eco-friendly product line**

5

ANYTOWN, Utah – Initech, a global leader in consumer electronics based in Anytown, announced the launch of its new eco-friendly product line, EcoTech Series. This innovative series includes a range of products designed with sustainability at their core, including solar-powered smartphones, biodegradable phone cases and energy-efficient home appliances.

The EcoTech Series marks a significant milestone in Initech's ongoing commitment to environmental responsibility. Each product in the series is manufactured using recycled materials, reducing the overall carbon footprint and promoting a circular economy. Additionally, the packaging has been redesigned to be 100% recyclable, further minimizing waste.

6

"At Initech, we believe that innovation and sustainability go hand in hand," said Jane Doe, CEO of Initech. "The EcoTech Series is a testament to our dedication to providing cutting-edge technology while also protecting our planet for future generations."

To celebrate the launch, Initech will host an event on Aug. 30 featuring live demonstrations of the new products and interactive sessions with the design and engineering teams. Consumers are invited to the event and participate in a Q&A session to learn more about the features and benefits of the EcoTech Series.

The EcoTech Series will be available for purchase starting Sept. 1, with products available through Initech's official website and select retail partners. For more information about the EcoTech Series and Initech's sustainability initiatives, please visit Initech.com.

###

About Initech Corporation 7

Initech is a world-renowned leader in consumer electronics, dedicated to delivering innovative and high-quality products that enhance the lives of consumers around the globe. With a strong emphasis on sustainability and corporate responsibility, Initech is committed to making a positive impact on the environment and society.

Header (points 1-3 on the sample release)

1. Letterhead

- Center at the top of the first page
- The format varies by organization, but is typically a combination of a name, logo and address
- It only appears on the first page of the release

2a. News release

- This label allows the recipient to immediately identify the document
- Should be in **Bold** typeface, typically 24-point type

2b. FOR IMMEDIATE RELEASE

- Appears in Bold and All-Caps, about a line break below "News Release"
- This means the release is suitable for publication upon receipt
  - Some news releases are embargoed, meaning they are not to run until a certain date. This label eliminates any confusion
    - If the news release *is* embargoed, use the phrase "UNDER EMBARGO UNTIL" followed by the embargo date, which is when the journalist may publish the story

2c. Date

- Today's date (follow the format used in AP Style)
- This is the date the release is being sent. It's not related to any other dates that may be mentioned in the release.

3. FOR MORE INFORMATION:

- Bold typeface, All-Caps
- Should appear on the same line as "FOR IMMEDIATE RELEASE" to lend visual balance.
- Placing contact information here rather than lower does a couple of things: It places your name in a position of prominence and also provides the recipient with all relevant information at a glance.
- Contact Information in this section should include:
  - Name
  - Position
  - Phone

    - Email

Headline & Body (points 4-6 on the sample release)

4a. Headline

- Leave an inch or so between the content of the header and the headline
- Bold and centered
- Capitalize the first word and any names (people, buildings, orgs)
- Lowercase all other words
- Content should summarize the story's main point and local angle
- Use:
    - Active voice
    - Short words
    - Commonly understood abbreviations
    - Present tense[20]
        - For future tense, an upcoming event, for example, use "to" followed by a verb, e.g., "to host"
    - 'Single-quote marks'[21]
    - A comma rather than "and"
- Omit:
    - Forms of the verb "to be" (is, am, are, was, were, be, being, been)
    - Articles (a, an, the)

4b. Dateline

- The location that the story takes place
    - It's called a "dateline," but no date is involved
- Establishes local interest
- Name of the city is in all-caps
- Comma between the city and state
    - LAWRENCE, Kan. –
- State abbreviation follows AP style, not postal abbreviations
- AP has a list of 30 cities considered prominent enough to stand alone, and no state should be listed
    - Ex: SALT LAKE CITY –

5. Lead Sentence and Paragraph

- Intent is to immediately capture someone's interest and make them want to continue reading. Think of it as your elevator pitch.
- Establishes the main idea and sets up the rest of the story
- A good newsworthy first sentence concisely covers *who, what, when, and where.*
    - Of these, "When" is typically the least important, so don't sweat it if it feels like a stretch.
- The story never relies upon the headline for information or context.
    - The headline is often one of the first things an editor will alter.
- Print journalists often spell it "lede," so use that spelling when communicating with media members[22]

6. Second and third paragraphs

- Build upon the lead and transition to the paragraphs that follow
    - Common to include an attention-grabbing quote from a key figure
    - Supporting facts that emphasize the news

Inverted Pyramid

The most common way to construct a news story is to follow a structure known as the inverted pyramid. Start with the most important information, expand on it, and then arrange the rest of the story in descending importance.[23]

This style is not without its disadvantages,[24] but this is a case where it's better to learn the rules before you break them. In other words, learn how to construct a story in the traditional way before deviating from the formula.

The lead sentence (and opening paragraph) establishes the most newsworthy information and answers who, what, when, where, and why.

The next paragraph amplifies the lead and provides a transition to the paragraphs that follow. It's common to include quotes from key figures and supporting facts that emphasize the news in the second and third paragraphs.

From there, include additional quotes and information in descending importance, meaning that background, general information, and minor details appear last.

This doesn't mean the story just fizzles out toward the end. Rather, it's an opportunity to circle back to an established theme, provide a representative anecdote that ties back to the lead, or offer a statistic that's relevant to a key point. As one journalist put it, "Want to write well? Open with a punch, close with a kick."[25]

Content: Quotes and Transitions

- Quotes
    - Good quotes provide color, emotion, and/or opinion
    - They make the story lively.
        - Readers find them interesting.
    - They make the story believable.
    - Reliable sources are speaking in their own words in the story.
    - Quotes are not *always* required
        - Sometimes if the release is just a brief blurb, a quote is not necessary or expected.
        - It's better to omit a weak quote than include it.
            - Self-praise, stating the obvious, or reporting statistics are all low-quality quotes.
    - Three Basic Types
        - Direct quotes
            - The best direct quotes are short and emotional.
            - Use a direct quote when someone says something important, colorful or controversial,
            - Allow the source to speak directly to the reader through the quote to reveal their character or when you can't improve the information through other means.
        - Indirect quotes
            - Use when sources don't state ideas effectively.
            - Rephrase the quotes for clarity.
            - Writers can combine ideas from several direct quotes into an indirect quote.
        - Partial quotes
            - Partial quotes are one solution to a weak/confusing quote, but it's not an ideal way to write. Partial quotes can be awkward and distracting.
            - Avoid "orphan quotes" that place quotation marks around one to two words that were used in an ordinary way. This can imply an unusual or sarcastic delivery.
    - Final Tips for Quotes
        - Summarize a major point immediately prior to a direct quote.
            - The quote then provides new information that enhances that summary. It should not repeat facts.

    - The default attribution is "X said" not "said X" or "says" (TV and radio use present tense; print and online use past tense.)
    - Always use "double-quote marks" rather than 'single-quote marks.' The only two exceptions are headlines and quotes within quotes.
    - If a quote is good but lengthy, split it and place the attribution in the middle.
    - Less experienced writers commonly struggle with placing quotes in a way that doesn't sound clunky.
        - The best way to improve is to review published articles. Notice how they set up the quote and how the quote pushes the story further. Study how the quote is structured, including the placement of attribution as well as punctuation.
    - Unlike traditional journalism, PR and Strategic Communication practitioners can craft a quote and attribute it to another person at the organization (after getting their approval).
- Transitions help the story move from one fact to the next in a way that's smooth and logical. If our story is a train, transitions are "the couplings that hold the cars together."[26]

Final Formatting

- The body should be single-spaced, with line breaks (and no indents) between paragraphs.
- If the release exceeds one page:
    - type -more- or -over- centered at the bottom of the page;
    - on all pages after page one, in the upper-right corner, provide the slug and page number. The slug is a condensed version of the headline, typed in all-caps.[27]
- After the last line of content in the release:
    - add one more line break; then, centered at the bottom of the document, type either -30- or ### or END to signify the end of the release.[28]

Boilerplate (point 7 on the sample release)

- Boilerplate is standardized so an organization uses the same copy with every news release.
    - Take time to make sure it's written well and highlights the organization.
- Boilerplate should be a brief paragraph, no more than 100 words and is placed below the -30- or ### or END.
- It's essentially an "about us" for the journalist that provides background on the company.
    - It's tempting to include company info in the release itself, but that can be viewed as overly promotional.
- It's common practice to include products, services, clients, awards, vision, call to action, SEO friendly keywords, link to a website/landing page.

- For more, see examples in releases submitted to the AP and Business Wire.

Email News Releases[29]

News releases sent via email are similar to traditional releases in most ways. They differ in other ways. In crafting an email news release:

- The subject line is a brief variant of the headline and should be concise, precise, and relevant to the media writer's audience.
- Everything in the body is left-adjusted and single-spaced
- First line: "For Immediate Release"
- Second line: Date of the release
- Add a line break, then the headline
- The "For More Information" section is at the bottom of the release, after the story and boilerplate
- It is common to include: subscribe and unsubscribe links, as well as thumbnails that link to social media profiles.

Related Items

There are a handful of deliverables that are related to, and often included alongside news releases. These include media kits, fact sheets, media alerts, backgrounders, and story pitches.

- Media Kit
    - A media kit should include everything a journalist may need to write a story about the organization.
    - Commonly includes:
        - high-resolution photos of the management team,
        - photos and videos of the company office(s),
        - photos and videos of people working,
        - photos and videos of the product/service,
        - photos and videos of events.
    - *For more details & examples, see this post from the Pr.co blog*
- Fact Sheet
    - Sometimes, but not always labeled "Fact Sheet" at the top,
    - outline of who, what, when, where, why, and how,
    - bold headers and a brief paragraph on each,

    - ends with boilerplate (summary paragraph on the organization).
- Media Alert (a.k.a. Media Advisory)
    - concise,
    - labeled as "Media Alert" and includes a headline,
    - similar to a fact sheet and covers who, what, when, where, why and how,
    - difference is time-sensitive: There's no time to write a full story, so the alert is to notify media members to attend (who may also inform their readers, viewers and/or listeners).
    - Media sometimes used to follow up on a release. For example, an initial release may have indicated that a prominent politician was taking interest in a local problem and would visit the area. A media alert might be sent to provide information when the politician will be available for interviews.
    - They can be tempting to overuse, so limit usage to breaking news and significant upcoming events, as well as events that require media credentials.
- Backgrounder
    - The "story behind the story"
        - How did this issue arise?
        - Why did this event become notable?
        - Where did the company come from?
    - Backgrounders offer history for a journalist to use and also summarizes the current situation. The intent is to allow a media writer to develop a deeper story.
- Story Pitches
    - In this instance, you're pitching an idea for a story to a specific member of the media. The story angle is tailored to them, for their specific media outlet. It's common to list potential interviewees and other sources of information, as well as contact information.
    - Pitches that are not one-on-one are commonly viewed as spam.
        - A 2024 study revealed that only about 3% of all pitches for coverage receive a response (and that 3% *includes* "No" responses as well)[30]

Block Format is the most common layout used in business writing, which includes everything from cover letters to memorandums and formal letters to business partners and associates.[31] All writing is left-adjusted and single-spaced, with double spaces between paragraphs.[32]

Speechwriting

Public Relations and Strategic Communication practitioners are often asked to help craft speeches for organizational leaders.

When writing a speech:

- consider the goal, purpose, and the audience,
- 20 minutes or less is standard,
- write with their voice in mind.
- Situations vary:
  - They may provide certain phrases, talking points, or areas they'd like to cover, or leave it entirely to you.
  - They may want to deliver a speech where each word is written out in advance, or they may prefer a rough outline with bullet points and sentence fragments.
- Double- or triple-space the document using a large serif typeface.
  - Include clearly labeled cues for the speaker such as "pause for emphasis" either highlighted or noted in the margins. Be certain they are obvious enough to avoid a situation where the speaker accidentally reads them aloud.

Follow best practices for speeches with particular attention to the opening and closing remarks.

Social Media

Tips for effective communication on social media are scattered throughout the text.

There's a delicate balance between blending in and standing out, so choose wisely. Remember the difference between building bonfires and shooting off bottle rockets.

To establish and maintain a robust social media presence, it's helpful to consider what Karen Freberg calls the "six C's of effective writing for social media."[33]

- **Content**
  - create, curate, and feature relevant content and monitor effectiveness
  - should be something you and your audience is passionate about
  - copy should be an appropriate fit for the target audience
  - need an understanding of different social media platforms and what works best on each
- **Community**
  - people come together around common values and interests
    - Know how you fit in
  - understand what people want: Do they even want content? Do they want to engage with it, or just view it?

- **Culture**
  - related to community, but related more to enduring practices and behaviors and experiences
  - What's the appropriate or expected etiquette for how people interact with one another?
  - What are the long-standing debates or issues of significance?
- **Conversation**
  - People don't want to be advertised to all the time, and tune out when a brand pushes its messaging too hard.
  - Conversation is more than just replying to a post. It's an attempt to have a discussion that's meaningful for both parties, as well as those who view the public interaction.
  - You need to understand the appropriate tone, voice, and writing style.
- **Creativity**
  - relates not just to content creation, but real-time conversations with the audience
  - monitoring and listening can lead to better ideas and more effective communication
- **Connection**
  - In a sense, this is the end goal to keep in mind. When the other C's are aligned, you're able to generate a sense of connection.

Writing Styles for Social Media[34]

Different brands use different communication styles across social media platforms, and they do so strategically.

Below is a quick list of writing styles and the brands that use them:

- Professional (General Motors)
- Snarky and Spunky (Wendy's)
- Product- and Brand-Focused (Under Armour)
- Audience-Focused (Budweiser)
- Inspirational (adidas)
- Conversational (Dunkin')
- Witty (Taco Bell)
- Educational (Sephora)
- Personality Focused (Charmin)

Having a style and sticking to it helps carve out an organization's identity in online spaces.

AI Prompt Engineering

Generative AI is constantly evolving and improving. One rule of GAI tools like ChatGPT is "garbage in, garbage out," whereby a simple prompt is answered in a simple fashion. Providing context allows the user to "push the AI to a more interesting corner of its knowledge, resulting in…more unique answers that might better fit your questions."[35]

There are two ways of interacting with GAI: conversational prompts and structured prompts. With conversational prompts, the user interacts with GAI as though it were a human helping with a task. This is a good approach for someone new to GAI or new to a topic, and who is interested in exploring a bit

Structured prompts are more purposive in nature. It's been suggested that the need for structured prompting is a temporary issue that may be an unnecessary skill as AI improves, but at present, it helps.

There is some emerging alignment as to what constitutes a quality prompt, with some breaking it into four basic steps of "role, task, background and action."[36] A more comprehensive template suggests five basic categories[37]:

1. Role and goal:

a. tell AI who it is and how it should behave

2. Step-by-step instructions:

a. use simple and direct language that would be easy for someone to understand who may be unfamiliar with your specific area or request

b. break the problem down into individual steps, and clearly identify different parts of the process

c. If GAI is having issues following the steps, revise as needed

3. Expertise:

a. determine what you want GAI to do and how that differs from a default response.

b. indicate if the GAI should adopt a specific viewpoint or perspective.

4. Constraints:

a. Constraints refer to rules that guide GAI behavior with the user, such as limiting the output to a certain number of words

b. It may also be helpful to consider constraints in a broader context, and identify any obstacles or objections you'd like GAI to consider in formulating a response.

5. Personalization:

a. put GAI in the role of a guide, and ask it to ask you questions; that will lead to better prompts

b. work with GAI through a series of questions gives it context to help you, as it adapts to your specific scenario

GAI is a tool to reach a solution, not the solution itself. For strategic writing, it may be used for tasks including brainstorming, editing, and summarizing materials, creating copy and content, drafting speeches, and developing keywords for search engine optimization.[38]

It's helpful to provide GAI with examples and request specific output. That output from GAI should be a starting point, not the end point. Ask follow-up questions to refine the results, and never accept the results at face value: review it, build upon it, and humanize it.

Experts Talk Back:

Three Questions with Tegan Griffith, Public Information Officer at USDA Rural Development, Wisconsin.

Q: So, you work for the USDA office in Wisconsin, and focus on rural development. What exactly do you do for them?

It depends. The career field can kind of be generalized a bit. For this job, I work for former [State] Sen. Julie Lassa; she's my boss. So when an entity gets a grant or loan or something from the federal government, through our programming, we'll go and do the whole dog-and-pony show.

I'll give you an example.

My first event was with Habitat for Humanity. We went and visited a small town in rural Wisconsin, took a tour of all the floors of this house and learned about her story. We had some VIPs from Washington, D.C., come out, and it was just kind of like a tour for people and businesses who have gotten our grants.

A lot of it is taking Julie to these businesses, homeowners, you name it. There's a lot of panels. For me, it's preparing PowerPoints, taking photos, organizing all the stuff once everything is over, Tweeting, press releases, event planning, graphic design. It's a little bit of everything. (Laughs) It's a lot...[39] We have over 50 programs just in our rural development, which is ridiculous. A lot of what I do is front-end stuff.

For example, we have a really big program called our Reconnect Program for rural high-speed internet. Applications open August 1, so we're planning backwards for press releases and other big things like that. Washington, D.C., our national office, gives us a whole kit with talking points and slides and stuff like that, so we don't have to do it all. But once they give that to us, a lot of it is slipping it into a slideshow, writing op-eds for the state director, and getting it out ahead of time.

We have to do a lot of stakeholder outreach, like our economic development groups and chambers of commerce. So we send that out as much as we can with approved messaging that the White House has cleared. But yeah, we've got to reach everybody, so in Wisconsin, we have tribal outreach; we have minority outreach;

our chambers. And so we just really kind of blast everybody with a firehose, in a variety of ways leading right up to it.

You don't want to find yourself, especially in the government, you don't want to find yourself in a position where you're like "well, we told you guys about this," or there's a community that's really trying, and they applied to receive money but they didn't know how, or they didn't know about it. And I take that super personally. So, we do the best that we can with what we have.

Q: So with the whole dog-and-pony show, I'm curious: How much of it is storytelling and finding the angle you want to present to the public in terms of how the money is used and how people and organizations benefit? How much digging do you do or is there a formula for how you present the story to the public?

So for me personally, we have a programs specialist and a database with the federal government, and they'll be able to pull me some information so I can pull the statistics, the description, and which legislative district it's in. We have some core "meat and potatoes," but sometimes that stuff is boring and nobody cares about that on [the social media platform formerly known as] Twitter.

My approach has been that every time we go somewhere, I record audio on my phone because the first time we went out it was so cold outside, I couldn't keep up with typing my notes on my phone. I wound up with a good audio device I can plug into my phone and record it so I can go back and catch a quote, or just jot down the timestamp like, "Oh, this is really good."

We had Single Family Housing Month in June, and that's where we want to highlight the stories about the people that have taken advantage of our Single Family Housing Loan Program.

So, I wrote a story about this woman, who, her and her family and her four kids were living in a two-bedroom apartment, and worked with Habitat for Humanity, put in some sweat equity, and built a house. And management and upper-level types are there doing the whole "kissing babies and shaking hands" thing, and I tend to be off to the side listening for little stories. So the way I wrote her story—her kids are special needs, but you can't exactly say that—you want to protect her privacy, because we're out nationally. And so her kids have special needs. Well, they were having a problem with six people being in a two-bedroom apartment for a couple of years. And their kids couldn't jump up and down when they were excited. They had to be quiet because they were in an apartment all the time. And she told this story about how "now that our kids get excited, they can express themselves," and they have their own bedrooms, so their kids can grow and learn and be themselves in this house, in this safe environment without having to worry about making somebody angry.

The way she talked about it, she just lit up because it was about her kids. So that's kind of how I framed the story. I took her off to the side. I took pictures with just her and me while everybody was leaving, backing their bags. I stayed back with her and just made sure, because sometimes people don't want to tell their stories, or they're nervous about how you tell their stories, especially when it's something like this.

So I tend to look for the more important smaller things that everybody else may be overlooking. Our VIPs kind of made it a thing where they're like "well, you're Latina, or you're this, and your kids are that"—totally putting them into silos. And that family now has a really nice house with a roof over their head, and the kids can be themselves and have a backyard to play in. That's the human decency story that I would prefer to tell over saying "you're this, this, and this, and this is how we help you," because after a while it starts to feel really run-of-the-mill and government-y.

A lot of it was her story that I told. We also talked about our partnerships with Habitat for Humanity, and the town, and the economic development group, and volunteers, but the story wasn't about them. The story is about her and her kids, and that was the end of the story. So that was really good. I got some gold stars on my homework for writing that, and it was very rewarding because I know that I told her story with confidence, and she didn't have to worry about me putting her in some kind of silo or making her feel bad about her situation

Q: That's awesome. I'm glad that it's been a meaningful job and one that brings joy to you to be able to write that story in the first place—I'm so happy for you. So last question: What advice would you have for folks who are just on the verge of entering the workforce?

It's not about social media 100% of the time. You still have to know how to write well, because you're writing tweets, you're writing press releases and speeches. There's a lot of interpersonal skills. We have 50 people in our office here, and they range from just on the edge of retirement to 15 years younger than me...[40]

So, for students, you might have to do a little groundwork before you're handed the reins to an organization. They're not just going to give you the social media accounts on the first day—with the government at least. Agencies and other groups may be different...

Professor [Jim] Haney passed away earlier this year, but he said something—and I was so bummed when he retired—but he said something, and I'll paraphrase it here. He told our class if you want to stay relevant in this field, you have to look to the younger generations of people that are in college, and the people and practitioners that are coming up behind you because they're going to be the ones who know how to access their peer group and access current technology that you either haven't had an opportunity to be trained on, or you don't know about it, or haven't had the time to learn about it.

So, you have the folks ahead of you who can give you those hard skills—writing, interviewing, stuff like that—but then the ones behind you, you've got to keep them in your good graces. They'll teach you how to use

Snapchat for your organization. Maybe that's something you want to get off your plate. Or if some manager says "I want to be on TikTok," well, there's like six of you that can help us figure that out.

So, it's not really about the individual. It's about who you work for, who you represent, and the people you serve. And then just keep in mind that the people coming up behind you are going to be able to help you out at some point.

Tips and Tricks

There are a handful of principles to keep in mind with any strategic writing.

- Stay on message.
  - All communication is on-message or off-message.
- Beware the curse of knowledge[41]
  - The danger of expertise in an area is that it becomes difficult after learning something to remember what it was like to *not* know a concept or bit of information. There's a tendency to assume others understand our words, and share our skills and knowledge.
  - In communicating with other experts, this tends to matter less. But even then, areas of expertise don't always neatly overlap. In virtually every other instance, though, shed the jargon to connect.

Tactical Tip: Group Writing & MACJ

Harvard Business Review contends the writing process has four phases, each of which correspond to different parts of our brain: **Madman**, **Architect**, **Carpenter**, and **Judge**.[42]

In the madman phase, research and find out as much information as you can. In the architect phase, organize that information in a rough outline in a way that's strategic and makes sense. In the carpenter phase, craft sentences and paragraphs using the outline provided by the architect. In the judge phase, focus on overall quality control, including polishing the line-by-line phrasing, and correcting issues related to grammar and flow.

This process may be helpful as you craft any document.

It may also help with a group paper, as it can lend a sense as to how you could choose to divide the labor in a way that plays to the strengths of the group. Here, even though one person may take on the bulk of the responsibility for a particular phase, it's advisable for everyone to remain involved from start to finish. As the writing process moves forward, you may find that you need to revisit a previous phase to strengthen the final product.

- The singular is more powerful than the plural.
  - Dubbed "The Mother Teresa Principle," it echoes her observation that "If I look at the mass, I will never act. If I look at the one, I will."[43]
  - The most successful mass communication is that which most closely approximates personal communication.[44]
  - "Each of you" is better than "All of you" or "everyone"
- End the sentence with a strong word.
  - Just as you want to end the joke with a punchline, and not continue to talk beyond that, end the sentence on a high note.
- Vary sentence length
  - Vary the length of sentences to improve the flow of your writing. It's easy to have quite a few back-to-back sentences that are of a similar length. Mix it up! Shorter sentences pop, give the reader a break, and allow you to expand upon other ideas in greater detail.
  - This theory was perhaps best expressed by Gary Provost, in his work: "This sentence has five words." It'll only take a minute to read. Check it out.

Summary: Putting it All Together

Regardless of how complex a situation may be, we can always return to the three factors mentioned in Chapter 6: *Purpose*, *Audience*, and *Method*. Identifying what you want to accomplish, who you want to reach, and how you're trying to reach them will help determine the *content* and *style* of the messaging.

That strategic approach should also be informed by key concepts regarding interpersonal communication, persuasion, and storytelling. Knowing how and when to deploy those concepts is like knowing how and when to use certain tools in a toolbox: They'll help you get the job done.

Media Attributions

- Subaru ad
- Sample news release © Alexis Kiedaisch is licensed under a All Rights Reserved license

Notes

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3. Rothenberg, R. (1994). Where the Suckers Moon: An Advertising Story. Alfred A. Knopf: New York. (Page 144). Emphasis added.
4. “Episode 729: When Subaru Came Out,” (2016, Oct. 14). Planet Money [Podcast]. Retrieved from: https://www.npr.org/sections/money/2016/10/14/497958151/episode-729-when-subaru-came-out
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6. Mayyasi, Ibid.
7. Dicker, R. (2012, June 18). “Tim Bennett, John Nash call for a unified Gay Pride holiday, new marketing strategy,” HuffPost. Retrieved from: https://www.huffpost.com/entry/tim-bennett-john-nash-gay-pride-advertising_n_1591457
8. “When Subaru Came Out,” Ibid.
9. Mayyasi, Ibid.
10. IKEA is widely viewed as the first company to target the LGBTQ community, and it received bomb threats for doing so. Volkswagen also ran a very subtle campaign prior to Subaru, but played coy rather than acknowledging it outright, while Subaru unapologetically embraced the approach and began to openly support the community in other ways outside of the campaign.
11. Mayyasi, Ibid.
12. Just seeing if you were paying attention.
13. This study showed up to 75% of content in independent media is sourced from/influenced by PR, while also highlighting a 1930s study that showed more than 60% of stories in one newspaper came from PR, as well as a 1970s study showing 75% of articles in The New York Times and Washington Post were characterized more as “information processing” rather than reporting. A 2006 survey of 400+ journalists estimated 44% of all content was the result of PR contact. Data from: Macnamara, J. (2014). “Journalism-PR relations revisited: The good news, the bad news, and insights into tomorrow’s news,” Public Relations Review. http://dx.doi.org/10.1016/j.pubrev.2014.07.002
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16. Page, J.T. & Parnell, L.J. (2019). Introduction to Strategic Public Relations: Digital, Global, and Socially Responsible Communication, SAGE: Thousand Oaks, CA.
17. Hendershot, A., Loewen, L., Marsh, C., Guth, D.W., & B.P. Short (2024). Strategic Writing: Multimedia Writing for Public Relations, Advertising and More, (6th ed.), Routledge: New York.
18. Content from this section primarily comes from lectures by David Guth, the Hendershot et. al (2024) text, and

Bender, J.R., Davenport, L.D., Drager, M.W., & F. Fedler (2019). Writing and Reporting for the Media (12th ed.)., Oxford University Press: New York. Several of these bullet points were added to my own lectures years ago, and I did not always track the original source of information. In my experience, there is substantial overlap in the recommendations, but I'll readily acknowledge that these bullet points are woven together from fabric produced by other folks.

19. Note: The Hendershot et. al., (2024) citation is the most recent edition of the text, and it's used as the primary point of reference here, but the section on News Releases is essentially unchanged from earlier editions by those three authors.
20. The body is written in past tense, but headlines are different!
21. The body will use "double-quote marks," but headlines are different!
22. The rationale for the alternate spelling is to differentiate "lead" as in the beginning of an article from the lead that was commonly used in the printing press. Times change, but a good journalist will notice that you're "speaking their language."
23. For years, journalism textbooks attributed the development of the Inverted Pyramid Style to the telegraph. As the story goes, journalists previously had the luxury of writing stories as richly detailed narratives and then sending them as letters. The telegraph brought about the ability to transmit information at an instant, but transmissions were relatively expensive and not always reliable—the line may be lost—so the most important information was placed first. More recent studies show that widespread adoption of the Inverted Pyramid style didn't come about for several more decades, and it was only after the first journalism schools were established that the science of writing stories evolved, and the inverted pyramid was accepted as the standard. For more, see: Errico, M., April, J., Asch, A., Khalfani, L., Smith, M.A. & X.R. Ybarra (1997). "The evolution of the summary news lead," Media History Monographs, 1(1): 1-19. Those basic findings were echoed in Poynter: Scanlan, C. (June 20, 2003). "Birth of the inverted pyramid: A child of technology, commerce and history," Poynter. Retrieved online at https://www.poynter.org/reporting-editing/2003/birth-of-the-inverted-pyramid-a-child-of-technology-commerce-and-history/
24. Some facts may be repeated later in the body; there are no real surprises, since the lead reveals major facts; it locks the writer into a formula; it's overused. See Bender, J.R., Davenport, L.D., Drager, M.W., & F. Fedler (2019). Writing and Reporting for the Media (12th ed.)., Oxford University Press: New York. Pages 180-181.
25. Bender, J.R., Davenport, L.D., Drager, M.W., & F. Fedler (Ibid.). Page 186.
26. Bender, J.R., Davenport, L.D., Drager, M.W., & F. Fedler (Ibid.). Page 197.
27. Slug is another term that comes from the typesetting days where a line of lead was known as a slug.
28. These also date back to the telegraph: "30" was the Western Union code to signal the end of the document. Also, in a telegraph, "X" was used to mark the end of a sentence, "XX" signified the end of a paragraph, and "XXX" ended the transmission.
29. Hendershot et. al., (2024), Ibid.
30. Carter, A. (Jan. 19, 2024). "By the numbers: This is how many pitches actually get responses," PR Daily. Retrieved from: https://www.prdaily.com/by-the-numbers-this-is-how-many-pitches-actually-get-responses/
31. "Writing the basic business letter," (n.d.). Purdue Online Writing Lab. Retrieved from: https://owl.purdue.edu/owl/subject_specific_writing/professional_technical_writing/basic_business_letters/index.html
32. A general rule across Styles is that paragraphs are either indented with no space between them, or not indented with a double-space between them. Block Style uses the latter.
33. Freberg, K. (2019). Social Media for Strategic Communication: Creative Strategies and Research-Based Applications, SAGE: Thousand Oaks, CA.
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35. Mollick, E. (2023, Nov. 1). "Working with AI: Two paths to prompting," One Useful Thing, Retrieved from: https://www.oneusefulthing.org/p/working-with-ai-two-paths-to-prompting
36. Penn, C. (2023). The woefully incomplete book of generative AI. Trust Insights.

37. Mollick (2023), Ibid.
38. McCorkindale, T. (Feb. 7, 2024). "Generative AI in organizations: Insights and strategies from communication leaders," Institute for Public Relations. Retrieved from: https://instituteforpr.org/ipr-generative-ai-organizations-2024/
39. Note: A brief follow-up question regarding "front-end" preparation was omitted here in favor of ellipses, and her answer to both questions is presented in full here.
40. Middle portion of the response is omitted here. Then, after the "Agencies and other groups may be different" reply, her final summarizing statement is included, as it built upon her advice to current students.
41. Heath, C., & Heath, D. (2007). Made to stick: Why some ideas survive and others die. New York: Random House.
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12.

CRAFTING A PR PROPOSAL

Nathan J. Rodriguez, Ph.D.

"Big ideas come from the unconscious.
This is true in art, in science, and in advertising.
But your unconscious has to be well informed, or your idea will be irrelevant.
Stuff your conscious mind with information;
then unhook your rational thought process."
—David Ogilvy[1]

"To achieve great things, two things are needed: A plan, and not quite enough time."
—Leonard Bernstein

First, a Story…

Sweden was about to undertake the biggest logistical project in its history.

At precisely 5 a.m. on September 3, 1967, every single car within its borders would forever change from driving on the left side of the road to the right side. That day would be known as Dagen-H, or H-Day (*shortened from the Swedish word Högertrafikomläggningen*).

There were the logistics of the infrastructure itself, as each locality was responsible for making sure that roads would be repainted, that bus stops, bike lanes and traffic lights would be moved, and that intersections and even one-way streets would be redesigned. They had to change a total of 360,000 traffic signs throughout the country—and that replacement would have to be done the night before the change would take place.[2]

There's a PR angle as well.

There were 7.8 million people living in Sweden who needed to know about the change. This was a case where an 80% success rate would be a disaster. Do the math, and there's a substantial difference between 95% or 99% and 100% of the population knowing about the change.

The change was unpopular as well: In a nationwide referendum less than a decade before the project, 83% of Swedes voted to keep driving on the left.

So, the task force responsible for the change—the Swedish Commission for the Introduction of Right-Hand

Driving—started a four-year initiative to raise awareness. It developed its own logo. It used TV, newspapers, and radio to get out the word. They had talks in schools regarding the change; they put ads on buses. Milk cartons had slogans like, “Smile a little in right-hand traffic. We are all beginners.”[3] The commission even held a nationwide contest to create a theme song for Dagen-H, and the winner rose to #5 on their pop chart. Public-service TV stations—basically the equivalent of PBS—featured global celebrities on their most popular shows.

The morning of the change, nonessential traffic was banned for several hours in various parts of the country. At 4:50 a.m., 10 minutes before the change, all traffic came to a complete stop, and then changed sides at 5 a.m., facilitated by a live countdown on the radio.

Planning for Dagen-H was a success by nearly every measure. The traffic accidents that day were all minor, and wound up being below the daily average.[4] Sweden’s approach provided a nice template for its neighbor as well. Iceland made the exact change the following year. *For more, check out this 7-minute video.*

The Takeaway

Not many **Awareness Campaigns** are truly a matter of life and death, but Dagen-H was.

The level of coordination required for the campaign to succeed was immense, in terms of timing and logistics, as well as the planning and strategic roll-out of a range of PR, marketing, and advertising tactics.

It was also a perfect example of when goals, objectives, strategies, and tactics align.

What We’ll Cover:

- ★ Process
- ★ Components of a Proposal
- ★ Presenting the Proposal

Process: From Proposal to Campaign

A good PR proposal is a balance between art and science—a blend of strategy and creativity.

There are four basic steps in the process: Study, Plan, Act, and Report (SPAR).[5] You’ll first **Study** the client’s situation, following the guidelines of a situation analysis and researching the client, industry and audience. From there, you'll develop and eventually present a **Plan**, which is the proposal itself. You'll then **Act**, which moves things from words on a piece of paper to actual actions on behalf of the client. You'll execute the campaign through the steps outlined in the proposal. Finally, you'll **Report** back to the client. More accurately, you'll "Report results and revise recommendations." In other words, you'll maintain contact with the client throughout the process, compare the results with expectations, and possibly revise your recommendations as you move forward in the relationship with the client.

Components of a Proposal

A PR proposal is a well-researched description of where a client is at, coupled with a vision of where the client *could be* by implementing a specific PR campaign.[6]

Each situation is different, and there is no single, universally agreed-upon set of components that belong in a proposal, but a reasonably comprehensive checklist for a formal PR proposal[7] includes:

- Title Page
- Table of Contents
- Executive Summary
- Situation Analysis
- Goal / Objectives
- Audience
- Strategy
- Tactics
- Calendar/Timetable
- Budget
- Evaluation
- Conclusion
- References
- Appendix

The amount of work required to complete each component varies substantially.

As a general rule, the writing should be concise, the style should be professional, and the tone should be confident.

The remainder of this chapter explains how to construct each of these components.

Title Page

Give the proposal a title of some kind. It's normal to have it based around a theme or key message of the campaign. It should be short and snappy, similar to a headline or tagline. A subtitle is optional, and typically includes the word "proposal."[8]

From there, include the name(s) of the author(s) as well as the date. The name of the agency is included, and some student groups have chosen to create a name for their group as well. One advantage in doing so is that first- and second-person writing is to be avoided in PR proposals, and adopting an agency name can make third-person writing have a more natural feel.

An average title page is forgivable, while a great title page can establish a positive first impression.

Table of Contents

After the title page is the Table of Contents—neither of these pages is numbered.

"Table of Contents" should be centered at the top of a new page. It includes the name of each section in the proposal and a corresponding page number.

Executive Summary

An executive summary is a one- to two-page document that summarizes the proposal. It is not an introduction to the proposal. Rather, it's a stand-alone document that summarizes the proposal, and usually includes elements of the situation analysis, audience, strategy, and tactics.[9]

It's the first numbered page of the proposal.

The idea is that a busy executive, who may not have time to read the full proposal, can read the executive summary to get the main idea. From there, it serves as a concise point of reference for all decision makers and participants in the process. For that reason, the executive summary may be the most important component of any report.

It's advisable to synthesize key points, but stop short of a complete "copy and paste" from the proposal. All the content in the summary should appear in the proposal itself.

Even though it appears first in the proposal, it may make sense to save this as the final piece of writing, as that can facilitate a more accurate and complete summary.

Situation Analysis

We've covered this one already! If you skipped or skimmed Chapter 5—*because life is busy and fun, and the title "Theory and Research" might have sounded dreadful*—head back there for a full rundown.

This section includes client research, industry research, and audience research. The situation analysis is the science and logic that provides the strategic foundation for the creative side of the proposal.

No part of the situation analysis should mention any part of your plan to remedy the situation. Rather, it's "the sum of what you already know,"[10] and a snapshot of where the client is.

The next sections pivot to what *could be*.

Goal & Objectives

Some experts recommend including a statement of purpose—also a single sentence—that serves as a transition point between the situation analysis and the rest of the proposal.[11]

It is also perfectly acceptable to conclude the situation analysis in such a way that flows naturally to the objectives section—and it's therefore unnecessary to include a goal or statement of purpose.[12] Should you feel a transition point is necessary, go with it. *Consider this the "add salt and pepper to taste" part of our recipe.*

A **Goal** is a fuzzy idea of what you'd like to accomplish. It's a "positive restatement of the core problem" that was identified in the situation analysis.[13] In other words, if the problem is lack of awareness, the goal would be to generate awareness. The goal may be described in a single sentence, or perhaps a few sentences if needed.

Objectives are "specific milestones that measure progress toward achievement of a goal. They provide specifics that include a target, and a date by which you'll hit that target. Two or three objectives are generally preferable. More objectives bring a risk that efforts will be diffused across multiple tasks to achieve different end-goals, rather than all efforts being aligned toward a single purpose.

Objectives that link back to the client's organizational strategy and mission tend to be more persuasive, which is particularly important to create a sense of "buy-in" for key actors: You're speaking their language.

A well-written objective is SMART[14]: **Specific** (clear and unambiguous), **Measurable** (quantifiable so that everyone may agree as to what "success" looks like), **Attainable** (realistic given the situation analysis), **Relevant** (in that it concerns a core problem that needs to be resolved), and **Time-Bound** (that includes deadlines).[15] An objective is typically written as a single sentence, beginning with "to."

Understanding Goals, Objectives, Strategies & Tactics

A proposal sums up the situation a client faces and offers some ideas and specifics on how you'll help them. That's it.

A basic way to assemble a proposal is by using goals, objectives, strategies, and tactics. These aren't just hoops to jump through: Everything must work together. It can help to mentally pair goals with objectives and strategies with tactics.

A goal is a broad, slightly vague idea of something you want to accomplish. An objective defines what success looks like for that goal. A strategy is the general way—or ways—in which you'll try to achieve your objective. Tactics are the way to implement your strategy.

Those concepts can be used in a wide range of contexts. Here's a non-PR example: Our goal is to lose weight. An objective would be to lose 10 pounds in 12 weeks. Our Strategies could be to eat healthier and work out more frequently. Our tactics could be to shift to the Mediterranean Diet and hit the gym three times a week.

Now for a PR context: Our client is a start-up company that makes scented candles. They haven't been in business very long, so the goal is to boost awareness. An objective might be to boost online mentions by 15% over 90 days. Strategies might include running online contests and attending a farmers market. Tactics for the online contest might include sample posts with images, text, and details regarding the contest. For the farmers market, the tactics might include signs, QR codes, business cards, sign-up sheets, and light event planning.

Check to make sure you can move smoothly from goals to objectives and from strategies to tactics. You should also be able to reverse it and easily observe how these particular tactics are the best way to enact the strategy, and this particular strategy is the best way to achieve the objective, and finally that this particular objective is the best way to reach the goal.

Finally, remember all those social psychology, persuasion, and storytelling concepts from Chapters 5-8? Those provide a research-based rationale to suggest a particular approach in your strategies and tactics. Figure out which fits the situation and use it.

Even some practitioners confuse goals with objectives, and conflate strategies with tactics. Understanding distinctions between the concepts and also how each relates to the other can help identify potential issues or weaknesses with an approach.

Audience

The term **Audience** has been discussed at length already, but the idea here is to first define specific subsets of the general public with whom you want to connect. The so-called "target audience" typically includes a primary public and a secondary public. Define each to the best of your ability, including all relevant and available demographic, psychographic, and behavioral information.

Articulate a rationale for selecting this target audience instead of other potential audiences and specify whether it's a "new" audience or an existing target audience.

Focus on their knowledge, attitudes, and behavior. Useful information regarding the target audience includes:

- Their sources of knowledge and attitudes
- How they acquire and process information
- Whether (and how) influencers affect an audience segment
- The messages that resonate with the audience segment
- Their desires, ambitions, and higher-order motivations.[16]

From there, some practitioners put together an audience profile—also known as an audience persona (also called a buyer persona, customer persona, target persona, and marketing persona)—that is essentially a fictional character who represents and embodies the characteristics of the target audience. That information is typically gleaned through the use of focus groups and other forms of primary research.

Relying upon surface-level observations and stereotypes isn't just ethically problematic and lazy: It's a wasted effort, because shallow and reductive messaging doesn't work. It may be useful to have many voices and perspectives in this stage to ensure you move beyond the obvious and tap into something worthwhile.

The better your insights, the better your chances are of understanding and connecting with the audience in a meaningful way through strategies and tactics.

Strategy

A **strategy** is a clear statement of how you'll achieve the objectives. In describing the strategy, use action verbs such as "develop," "create," "promote," and "target." It's what you'll do and why you'll do it.

It is common to suggest multiple strategies, as long as those strategies are in alignment with one another. For example, Niagara Conservation, in its award-winning #WhatTheFlush campaign that promoted a new toilet, adopted a four-prong strategy:

1. Leverage celebrities and influencers as brand ambassadors to create the kind of endorsements that could reach millions of consumers.
2. Drive purchase intent by creating disruptive and memorable advertising or digital content that fosters an emotional connection with consumers.
3. Secure earned media awareness of Niagara's Stealth Toilet to keep its benefits at the top of consumers' minds
4. Use social media to expand campaign reach by recruiting more consumers to connect with Niagara online.[17]

Each strategy should then include a description of the approach, as well as an explanation about why you selected the approach. The length varies based on the complexity of the strategy and the level of persuasion required, so it might range from a couple of well-constructed paragraphs to a couple of pages.

The strategy section often includes a key message that guides the strategic approach to the campaign.[18] A key message is what you want the target audience to understand and accept. It's what you hope they remember after encountering your content. The key message should be clear, interesting, relevant, and include a call to action.

Strategy & Tactics: Etymology

"Strategy" and "tactics" both have roots in ancient Greece and were originally used in a military context.

The word strategy comes from Strategia, or the art of planning and directing military operations, focusing on overall and long-term goals.

The word tactics comes from Taktike, or the art of setting up soldiers in a suitable battle scheme to achieve victory.[19]

One of the most common errors is to start thinking about tactics before deciding on a strategy.

A strategy establishes why something is suggested, and why it will achieve the objectives, but tactics are what get the job done. Put another way, "a strategy is an approach, and a tactic is a task."[20]

Tactics

Tactics (often referred to as "deliverables," "collateral," and "mock-ups") are the means by which a strategy is executed. Simply put, "Everything that costs money besides research and measurement is a tactic."[21] A proposal typically includes sample tactics, and the term *deliverables* is functionally the same thing: Items the client could put to immediate use.

If part of a strategy is to create awareness through mainstream media publications, sample tactics might include drafting news releases and pitching stories to various outlets.

In a proposal, the tactics section is dedicated to describing why specific choices were made. In a news release, that might include how elements of a story are characterized, the story angle itself, why certain points were emphasized, or why a particular writing voice and tone were deployed. The sample tactic—the actual news release—is placed at the end of the proposal in the appendix. This is done to minimize the disruption to the flow of the proposal, and to provide each tactic with its own space.

Question: GOST in Action

Consider the Dagen-H anecdote at the beginning of this chapter.

Using the set of facts that were laid out, identify the possible goal, objectives, strategies and tactics of that campaign.

Calendar / Timetable

Call it a calendar or call it a timetable: It's up to you. But it needs to be included in the proposal.

We've reached the point where a proposed course of action has been laid out, and this section provides details about when and how to implement the plan.

A campaign might last less than three months, or it might take more than a year. Timing can be crucial, as some subjects may be seasonal. This section includes a list of major actions, milestones, and deadlines so that all parties have a shared understanding of what will happen when.

There's a saying that "timing is everything" in life, and the same is said of sequencing tactics for a campaign. It's typical to "concentrate the most effort at the beginning of a campaign, when a number of tactics are implemented. The launch phase of a campaign, much like that of a rocket, requires a burst of activity just to break the awareness barrier. After the campaign has achieved orbit, however, less energy and fewer activities are required to maintain momentum."[22]

Message Repetition

One-off messages are unlikely to be effective, so messages need to be repeated. In considering the potential scheduling of communication tactics, consider the following concepts: continuity, bursting, and pulsing.

Continuity presents a steady stream of messaging over a period of time. It can be helpful to maintain an active presence, but is typically expensive to continuously maintain when compared to other approaches.

Bursting (also known as flighting), is when messaging comes through in waves. There are bursts of activity across multiple media channels followed by periods of inactivity. The approach is helpful for organizations with predictable or seasonal periods.

Pulsing is a blend of the first two approaches, with a certain baseline of messaging supplemented by additional bursts of activity.[23]

These terms may have originated from the advertising world, but they can be applied to the scheduling and coordination of various strategic communication tactics.

It's usually helpful to "plan backward" from an important date, and understand required lead times for planning, production and publication. But be sure to double-check big dates—are there any conflicts or regularly scheduled events that may pose an issue or an opportunity?[24] Plan around those.

There are an infinite number of ways to create a calendar or timetable. Below is an example of what one might look like.[25] Explanations of each category are below the table.

Delivery Date	Tactic	Objective	Audience	Communicator	Method	Review Date

"Delivery Date" is when the finished product is due—when the Tactic will be distributed, or delivered.

"Tactic," "Objective," and "Audience" are reasonably clear: List the tactic being referenced, the objective connected to that tactic, and the target audience.

"Communicator" is used to designate which individual or team is responsible for the tactic. "Method" is how that message will be delivered, as it might range from face-to-face or a specific social platform. Finally, "Review Date" is an internal deadline prior to the Delivery Date where the team assesses progress and can recalibrate if needed.

Again, there isn't one commonly agreed-upon way to create a Timetable, but these are common considerations for most Proposals.

Budget

Cost is a fundamental concern for most clients and employers.

Many times, you'll be given a budget and asked to formulate a proposal with that constraint in place.[26],[27]

A budget requires a spreadsheet or at least a table. This may be supplemented by a brief discussion of any figures that require an explanation. If the question "where did this number come from?" appears reasonable, it's worth a quick mention.

The formatting of the spreadsheet or table varies based on the complexity of the solutions being suggested and the preferences of the decision makers. In any case, it's recommended to "organize budgets in a way that makes sense to the people funding it, and to make sure that you carefully think through the categories so you don't leave out any major expenses."[28] For example, if you're attending an event as a vendor, there may be fees related to transportation, parking, and registration, as well as procuring pop-up canopies, tables, and banners. Be thorough.

All budgets should include room for unanticipated expenses, as well as a grand total. It's considered best practice to allocate 10% of the budget for contingencies, in case unexpected expenses arise. It's prudent to provide an upfront allowance baked into the total cost, rather than having to return and beg for more money.[29],[30],[31] And then, after that 10% has been added to the subtotal, provide a "bottom line" number with the total cost clearly identified.[32]

A basic two-column budget includes both staff time, and out-of-pocket expenses. The out-of-pocket expenses are typically more obvious, but staff and administrative time will often command more than two-thirds of the budget.[33]

Photo by Karolina Kaboompics via Pexels.

How much will it cost?

It never hurts to inquire about pricing. The reason is that TV and radio are generally negotiable because audience size fluctuates dramatically. Magazines and newspapers are generally not negotiable because they have a more stable audience. Digital is considered “somewhat flexible,” so the lesson here is “don’t pay sticker price, if you can avoid it.”[34]

A few resources for baseline pricing include:

SRDS (Standard Rate & Data Service)

Winmo, formerly known as REDBOOKS

Nielsen.com

A detailed breakdown involves more work, but offers a more strategic view of expenses. One way involves the creation of 10 columns:

1. Public

2. Strategy
3. Tactic
4. Detail (brief description of tactic)
5. Staff expense
6. Quantity needed
7. Cost per unit
8. Total projected cost for budget item
9. Sponsored credit (donations from partners)
10. Actual projected cost (number of units times per-item cost, minus sponsored credit)[35]

Each tactic gets its own line and then you can include subtotals for both the public and the strategy.

This may be more detailed than needed, and some columns might not have expenses associated with them, but there are a few advantages to this approach. First, the "sponsored credit" simply means that certain items or services are being donated through a partnership–and being able to document those defrayed costs can become a compelling selling point. Second, because these expenses are grouped by the public, strategy, and tactic—with subtotals—it allows everyone to see precisely what chunk of the budget is going toward a particular target audience. That can then lead to consideration of how efficiently and effectively money is spent—and result in better, more creative solutions.

Evaluation

The evaluation component links back to the initial objectives, and describes the process for reporting progress and results. It's also an opportunity to make the case for a bigger budget or future budget requests.

Objectives, of course, need to be measurable. Here, each objective should be restated and followed with a description of how it will be measured and evaluated. Just as we crafted SMART objectives, evaluation criteria should be "realistic, credible, and specific."[36]

When monitoring the initial results, remember the "R" in SPAR isn't just "report," but "Report results and revise recommendations." If things aren't going according to plan, change the plan. This may be as simple as tweaking a single tactic or a full reconsideration of how to approach a particular public. It helps to be up front about the possibility of future changes based on feedback and results, rather than appear that you're scrambling or taken off-guard after the campaign goes live.

After the campaign has launched, it's common to check in three times. The first is an implementation report that objectively documents how tactics were rolled out, the progress that's been made, issues that have arisen, and work that is left. The second is a progress report, where practitioners will typically assess the effectiveness of the campaign to date while there's still time to make adjustments. The third is a final (or summative) report that provides an overall summary and assesses whether the campaign strategies and tactics achieved the objectives.[37]

Conclusion

This section is optional.

If you nailed the dismount in the evaluation section, take the win.

Otherwise, include a very brief concluding paragraph or two here. The content is essentially a condensed iteration of the key parts of the executive summary—a quick mention of the core problem, the recommended set of actions, why the plan will work, and what success looks like. It's also appropriate to mention future steps or how you'll get started.[38]

References

Include a references page that follows APA Style.

The use of footnotes or endnotes is generally acceptable in lieu of in-text citations, as they serve the same purpose but are less distracting for the reader.

Appendix

After the references page, start the appendix on a new sheet of paper. Here you'll include sample tactics, as well as charts, tables, and anything else in the proposal that is either disruptive to the overall flow or deserving of its own space. Just be sure to indicate in each section when certain content is located in the appendix.

Experts Talk Back:

Three Questions with David Guth, Associate Professor Emeritus at the William Allen White School of Journalism and Mass Communications at the University of Kansas.

Guth earned a Peabody Award as a journalist, and has decades of experience as a PR practitioner and professor. He is co-author of the textbook *Strategic Writing: Multimedia Writing for Public Relations, Advertising and More*, and is author of multiple works of fiction, including his latest: *In the Moment: Journey of the Class of '70*.[39]

Q: I know you as someone who knows and cares a great deal about history, so I thought I'd begin our discussion with a quote about PR Proposals from Edward Bernays—who I know is certainly a complicated figure—from 100 years ago:

"How does any public relations counsel approach any particular problem? First, [they] must analyze [the] client's problem and...objective. Then [they] must analyze the public [they are] trying to reach. [They] must devise a plan of action for the client to follow, and determine the methods...of distribution available for reaching [their] public. Finally, [they] must try to estimate the interaction between the public [they] seek to reach and [their] client. How will [the] client's case strike the public mind? And by public mind here is meant that section or those sections of the public which must be reached."[40]

When I read that, the first thought that comes to mind is "the more things change, the more they stay the same." Through your study of the past, and through your experience as a practitioner and as a professor, in what ways have PR proposals changed and in what ways have they remained the same over the years?

Well, my first reaction to Bernays is "Gee, it would have been great if you'd actually followed that!" I actually used to refer to him as "Fast Eddy." But he was a great man, so let's give him his due.

The one thing that Professor [Charles] Marsh and I latched onto fairly early is nowhere in there does it explicitly say "values."

Bernays is on the periphery of that, and if you wanted to be generous, you could say that he understood that. And the other thing he didn't mention there—and this was more of an Ivy Lee thing—but there's a social responsibility aspect which, again, closely aligns with values.

The overall thrust of the quote you just mentioned is spot-on. It's just the omissions—those two particular omissions. And it's not because I think that we're more moral today than we were in the 1920s.

The thing is, we're being held more accountable because there has been a power or a paradigm shift in the last couple of decades where the people have access to far more information, and more importantly, they also have access to their own media than they did before. It might be the Rodney King moment, when the LAPD was caught on camera—and there may be earlier examples than that, but that's the one that first comes to mind for me. That's kind of a major shift in time where suddenly there's a shift of some power to the people to hold power and authority and companies and corporations accountable. I'll just sum up—

In short—which, by the way, is probably too late because it's a long answer—I agree with the overall thrust of what he said, but again, it's the major omissions of values, corporate social responsibility, and the public's ability to keep you more accountable.

Q: You were a practitioner prior to becoming a professor, and then you've gone back into practitioner mode doing strategic communication work on behalf of the Red Cross. I'm curious to learn more about that experience, and if you had any lessons to impart, or insight or examples from your time there that may be of interest to someone entering the field.

The Red Cross, first of all, has the best reputation of any organization in the world. Their brand is the greatest and there's a good reason for it.

One, they communicate with all their audiences. Ninety-three percent of the Red Cross' workforce is volunteers, so they do a great job of communicating with and recognizing volunteers.

They also do a great job of training. Even I—with my background, I still had to go through Red Cross training. And I'm glad I did. One, it reaffirmed some of the things I already knew, plus I had a better understanding of the Red Cross functions and things like that. They have a terrific training organization. So they pay good attention to all their stakeholders; they communicate well with them; they give appropriate recognition.

Plus, I've got their message book over here—and I can't share it because it's proprietary. But for example, in terms of things we should say, we have Blue Sky Rules and we have Grey Sky Rules. Blue Sky Rules are when nothing bad is going on, and we can do fundraising and things like that. In Grey Sky Rules, we don't raise money on specific disasters.

Because if you recall—and it wasn't totally their fault, but—with 9/11, they collected so much blood and money, people were saying "well, why didn't it go back directly to the people on 9/11?" and it was because they were using their funds they had raised earlier for 9/11, and it just keeps cascading back. So we have to do a better job of how that works. And so you'll notice during an emergency, we don't say "If you want to help the victims of hurricane such-and-such," they'll say "If you want to help, here's a phone number you can call"—and they're very careful about that...

So the messaging book is really helpful. When I'm writing news releases, or even doing feature stories, it's a great resource for me to go back and say, "here's some stats and things I can use that helps keep a very solid, clear, unambiguous message on behalf of The Red Cross."

Q: What advice do you have for students, who, in the next few years, are about to enter the field of Public Relations and Strategic Communication?

If you look at my background, I have been like a utility infielder: I played a lot of positions. And that has served me well through my career because careers exist today that did not exist when I graduated from college 50 years ago! Literally. It's been 50 years this December. I'm sure it'll be a great celebration: The post office will put out a stamp, and all that.

What I would say is, we go into college with certain ideas of where we're going to go and how we're going to get there. But keep your eyes and ears open, and try a number of different things.

Some people will say, for example, "I had an unsuccessful internship—I didn't like it at all."

Actually, you may not have liked it, but you learned that maybe you were doing something that you don't want to do.

And it's much better to find that out early than to get yourself on a path.

If I had better counselors, and if I had more personal direction, and was a little bit smarter myself, I can easily see myself having a career in emergency management, and having been very happy with it. I also could have seen myself having a career in play-by-play, but I did not have the opportunity, and frankly, if I knew then what I know now, I would have done things differently.

So the point of that is, don't be so certain that when you come into college that "this is what I'm going to do, and this is the path I'm going to go." Be willing to test and experiment and look at different things and try different things. And don't expect that the first job out of college is going to get you six-figures. You're going to have to work your way up. But it is a lot easier earlier in your career to make adjustments based on what you find are your likes and dislikes, and the opportunities that are presented to you. Then, when you have a house and a kid and a dog, and all sorts of responsibilities that limit your ability to move and do things.

There are a lot of people who—the Kevin Harlan's of the world—who said "I want to be a play-by-play announcer," and by God, he became a great play-by-play announcer. But there are a lot of people who—now here's an interesting one that has nothing to do with public relations—and you're probably a little young for the series, but have you ever seen *The Dukes of Hazzard*?

Yeah, I've seen a few episodes I vaguely recall when I was growing up.

So, the guy who played Boss Hogg: remember this guy? What a buffoon, right?

He graduated from Columbia at 19. He spoke six languages. He got a master's from Yale. In the Korean War, he interrogated Russian, Chinese, and Korean soldiers. The guy was brilliant. He never talked about that stuff. He obviously had a ticket to anywhere, and then he found that he liked acting. And I'm sure that he was very happy with it.

So keep your eyes open.

I would always tell our students, "Don't expect that the first job you get is going to be the one that gives you the gold watch at the end."

Presenting the Proposal

You'll likely pitch your ideas face-to-face or in the same virtual room as the executive team and decision makers. Remember they are the ones who got the organization in this situation, so be diplomatic in offering criticisms of the current approach.

The presentation should follow the same general order as the proposal. There is a strategic rationale behind assembling the proposal in a particular way, and that method of organization applies here as well. You're identifying the issue, suggesting a path forward, and going into detail regarding that solution. End with sample tactics, because that's what almost everyone cares the most about, and it transforms the pitch from an abstract idea to something concrete and actionable.

A presentation is a visual medium, so it contains far less prose, and relies on a few keywords, big ideas, and memorable phrases while leaning more heavily on images. Consider the general principles of public speaking, pitching, and visual communication. Time the presentation. Practice it. And when it comes time to present, remember that all the hard work has already been done—all that remains is a little show and tell of that hard work. It helps to be upbeat and confident without being overbearing and presumptuous. In academic terms, be the source of good, calm vibes.

Photo by RDNE Stock project via Pexels.

A question-and-answer session commonly follows. As we learned in "*Beyond the Spokesperson Tips*" section in Chapter 4, responses should be accurate. Do your homework and be ready to explain your ideas. Responses should also be clear, so respond with an answer that's precise and makes sense. You should, of course, also be honest, so if you don't know or aren't certain of something, or need to get back to them—say so. Don't guess. Own it. Finally, it never hurts to "always be a little kinder than necessary."[41]

Summary: Putting it All Together

There is no singular way to craft a PR proposal. Some may be shorter and more casual. The outline in this chapter is one way to organize a traditional PR proposal that a seasoned veteran would recognize as "proper." Some practitioners may place the "audience" section prior to "objectives," or call a component by a slightly different name—but the substantive core is the same.

If we return back to the overall process—study, plan, act, and report results and revise recommendations—there's a blend of strategy and creativity throughout.

Begin with science and end with art. Start with an objective analysis of the situation, build a strategy to resolve the issue(s), and then shift to a creative solution. If it's too heavy on the science side, the mundane solution may lack the dynamism to break through. If it's too heavy on the art side, the splashy solution may not be tethered to an overarching strategy capable of moving the needle in a meaningful way. A proposal that balances both and excels at each is more likely to win favor.

Finally, in sports, it's often said that a team can play to "not lose" rather than to play "to win," and there's a difference. It's easy to fall into that trap in crafting a proposal, and suggest a boring, middle-of-the-road campaign because it's considered a safe, by-the-book solution. Along those lines, the advertising firm Wieden+Kennedy (whose client roster includes Nike, Coca-Cola, Old Spice and Airbnb) has a wall with 100,000 thumbtacks and a simple phrase: Fail Harder. They applied the thumbtacks to the negative space, as the easier solution would have been to use them for the text. The message isn't to try, or even try harder—it's to swing for the creative fences. That's what separates a practitioner who is good from a practitioner who is great. So, don't just try harder—Fail Harder.

Media Attributions

Notes

1. Ogilvy, D. (1983). Ogilvy on advertising. New York: Vintage Books. For context, this quote appeared in the second of two relevant paragraphs regarding creativity: "You can do homework from now until doomsday, but you will never win fame and fortune unless you also invent big ideas. It takes a big idea to attract the attention of consumers and get them to buy your product. Unless your advertising contains a big idea, it will pass like a ship in the night. I doubt if more than one campaign in a hundred contains a big idea. I am supposed to be one of the more fertile inventors of big ideas, but in my long career as a copywriter I have not had more than 20, if that. Big ideas come from the unconscious. This is true in art, in science, and in advertising. But your unconscious has to be well informed, or your idea will be irrelevant. Stuff your conscious mind with information, then unhook your rational thought process. You can help this process by going for a long walk, or taking a hot bath, or drinking half a pint of claret. Suddenly, if the telephone line from your unconscious is open, a big idea will well up within you." (Page 20-ish).
2. "Dagen H, the day Sweden switched sides of the road, 1967," No Date. Retrieved from: https://rarehistoricalphotos.com/dagen-h-sweden-1967/
3. "Switch to the Right," (Sept. 15, 1967). Time. Retrieved from online archive at: https://web.archive.org/web/20070204075934/http://www.time.com/time/magazine/article/0%2C9171%2C941144%2C00.html
4. Savage, M. (2018, April 17). "A 'thrilling' mission to get the Swedish to change overnight," BBC. Retrieved from: https://www.bbc.com/worklife/article/20180417-a-thrilling-mission-to-get-the-swedish-to-change-overnight
5. Commonly used acronyms describing the process are RACE (Research, Action, Communication, Evaluation), and ROPE (Research, Objectives, Plan, Execute). The basic idea is echoed here. The reason SPAR is preferred is that "Plan" is commonly used to refer to a PR proposal, which hopefully becomes the plan of action. This hopefully minimizes the confusion between "action" and "communication" with one model, and "objectives" and "plan" in the other model. Plus, the acronym is fun if you use a pirate voice: "SPARrrr!"
6. This idea is drawn from the work of Igor Ansoff (1965) on "gap analysis," with the basic premise that organizations should analyze their current situation as well as their desired future situation, and build a strategy to reduce the gap

between them

7. This list follows the order of the substantive categories outlined in Wilcox, Cameron & Reber (2015), and for clarity's sake, adds some elements such as a Title Page and Executive Summary as mentioned by Smith, R.D. (2017). Strategic Planning for Public Relations, 5th ed., Routledge: New York and also suggested by Marsh, C., Guth, D., & Short, B. (2021). Strategic Writing for Public Relations, Advertising and More. (5th ed.)., Routledge: New York.
8. Marsh, C., Guth, D., & Short, B. (2021). Strategic Writing for Public Relations, Advertising and More. (5th ed.)., Routledge: New York.
9. Marsh, Guth & Short, Ibid.
10. Avery, J., & Yount, D. (2016). Advertising Campaign Planning: Developing an Advertising-Based Marketing Plan, (5th ed.), Melvin & Leigh: Irvine, CA.
11. Smith, R.D. (2017), Ibid. Marsh, Guth & Short, Ibid.
12. Wilcox, Cameron & Reber (2015), Ibid.
13. Wilson, L., Ogden, J., & Wilson, C. (2019). Strategic Communications for PR, Social Media and Marketing, 7th ed., Kendall Hunt: Dubuque, IA. (Page 92).
14. Adapted from: Doran, G. T. (1981). "There's a SMART way to write management goals and objectives," Management review, 70(11). Doran suggested Specific, Measurable, Assignable, Realistic, and Timely—over the decades since then, the variant mentioned in this chapter has been commonly used.
15. Other categories beyond those in the SMART Model include "written," "cost-conscious," "efficient," and "mission-driven." See Wilson, Ogden & Wilson, Ibid., pp. 93-96.
16. This is a lightly edited version of the six-point checklist created by Fulginiti, A., Fitzgerald, S., & J. Basso (2021). Complete Public Relations: Contemporary Practice. Kendall Hunt: Dubuque, IA. (Page 15).
17. Thanks to Luttrell (2019) for this example. Original source: Niagara Conservation and Padilla, (2017). "#WhatTheFlush: Disrupting the Water Conservation Conversation," PRSA Silver Anvil Award, Public Relations Society of America. Retrieved from: http://apps.prsa.org/SearchResults/Download/6BE-1705CB17059/0/WhatTheFlush_Disrupting_the_Water_Conservation_Con.
18. Wilcox, Cameron & Reber (2015), Ibid.
19. Falkheimer, J. & Heide, M. (2018). Strategic Communication: An Introduction. Routledge: New York. (Page 45).
20. Wilson, Ogden & Wilson, Ibid. (Page 153).
21. Ibid, p. 153.
22. Wilcox, Cameron & Weber, Ibid. (Page 165).
23. From Smith, R.D. (2017), Ibid. Page 346. Note: Smith also includes "Massing," which he describes as "the bunching of various presentations of a message into a short period of time."
24. Wilson, Ogden & Wilson, Ibid., pp. 193-194.
25. Adapted from: Salek, T.A. (2021). "The Recipe for Communicating Change: Using Kitchen Nightmares to Craft an Internal Communication Change Plan." Communication Teacher, 35, no. 2, 81-85.
26. Wilcox, Cameron & Reber, Ibid.
27. Kelleher, T. (2018) Public Relations. Oxford University Press: New York.
28. Kelleher, Ibid., p. 157.
29. Wilcox, Cameron & Reber, Ibid.
30. Marsh, Guth & Short, Ibid.
31. Luttrell, R. (2019). Social Media: How to Engage, Share, and Connect, 3rd ed., Rowman & Littlefield: Lanham, MD.
32. Either "Total" or "Campaign Total" may be used for this line.
33. Wilcox, Cameron & Reber, Ibid., p. 166.

34. Juska, J.M. (2018). Integrated Marketing Communication: Advertising and Promotion in a Digital World. Routledge: New York. (Pages 147-148).
35. Note: This is nearly verbatim what is suggested by Wilson, Ogden & Wilson, Ibid., p. 197. Here, “Public” and “Strategy” have been separated into different columns. The “Staff Expenses” column has been added. Otherwise, this organizational format is entirely theirs.
36. Wilcox, Cameron & Reber, Ibid. Pages 166-167.
37. Smith, R.D. (2017), Ibid. Pages 370-371.
38. Marsh, Guth & Short, Ibid., p. 259.
39. Full disclosure: The author was Professor Guth’s teaching assistant for multiple semesters as a graduate student.
40. Bernays, E.L. (1923). Crystallizing Public Opinion. Ig Publishing: New York. Page 167.
41. Full quote: “Shall we make a new rule of life from tonight: always to try to be a little kinder than is necessary?” by J.M. Barrie (author of Peter Pan) in 1902.

PART IV
STRATEGIES, TACTICS & FUTURE DIRECTIONS

13.

DELIVERABLES

Nathan J. Rodriguez, Ph.D.

"At a restaurant, you wouldn't order every item on the menu.
Likewise, don't try every tactic you can think of.
Instead, review [a] menu of public relations tactics carefully,
then select a full plate of items appropriate to the situation you are addressing."
—Ronald D. Smith[1]

"A good tactic is one that your people enjoy.
If your people aren't having a ball doing it,
there is something very wrong with the tactic."
—Saul Alinsky[2]

First, a Story...

Phish always does things differently.

The improvisational band from Vermont was a decade into their career. Despite quirky lyrics, complex compositions featuring confusing time signatures, and a grand total of zero radio hits, the quartet was successful. They garnered a reputation for outlandish, one-of-a-kind performances. The band closed out 1995 with back-to-back sold-out shows on December 30 and 31 at Madison Square Garden. Their formula worked, but they wanted to try something new. They wanted to host a two-day outdoor concert that would go beyond a musical performance and evolve into an experience.

There would be no other bands. No corporate sponsors. No VIP packages. And it would be held at a far-off location: A decommissioned Air Force Base 10 minutes outside Plattsburgh, New York, population 20,000.

How could that work?

At the time, there wasn't a blueprint for a successful multi-day music festival.[3] As guitarist and lead singer Trey Anastasio recalled, "Lollapalooza and Burning Man were the only two [festivals] that I remember, but Burning Man wasn't a music festival and Lollapalooza was a touring event that went to established venues, so we were really making it up as we went along."[4]

Fortunately, the band known for its improvisation on stage proved to be adept at advance planning, and—*spoiler alert*—the festival went off without a hitch. An estimated 70,000 fans attended the event, which made it the largest concert in North America that year.

How did that work?

Phish prioritized the comfort of fans, and were meticulous about the details that would provide a memorable experience. That started with ensuring smooth traffic flow to the event. Concertgoers received a map of the grounds, which included street names and a central square. An FM signal was set up to broadcast music and information during the weekend. A general store provided basic necessities, and ice vendors roamed the campgrounds, offering tent-side delivery. Artists built massive art installations near the entrance, and the band carved out "quiet time" so attendees could experience those art installations without music blaring. Jim Pollock, who designed much of the band's artwork, printed posters on demand for the event using a wood block technique.[5]

Planes flew overhead, pulling banners with messages including "Help…We're out of fuel…Seriously." The festival featured carnival rides, as well as jugglers and people on stilts roaming the campgrounds. There were mist tents during the day and fireworks at night. Three video screens. Four sound towers. On stage, guests included acrobats and a brief cameo by ice cream entrepreneurs Ben and Jerry. Movies played on a big screen following the end of the show each night: *Fantasia* (1940) on the first night and *Rocky Horror Picture Show* (1975) the next. There were other unannounced surprises, beginning the first night around 3:30 a.m., when Phish climbed into the back of a flatbed truck adorned with colorful lights that slowly drove through the campgrounds as the band played an impromptu acoustic bluegrass set.[6]

The Takeaway

The event proved to be—arguably—one of the first successful multi-day music festivals that provided a blueprint for others to follow. It was the absolute opposite of Fyre Fest.

Phish's concert was successful because of the attention to detail and because it provided a one-of-a-kind experience. It demonstrated what can happen when strategy meets creativity, and art balances with science. And it all began by centering efforts around the experience of fans, which ensured someone would not only return the following year—but that they'd drag along another friend or two because the experience exceeded expectations.

You may never plan a multi-day music festival in a remote location that spans thousands of acres, but you'll likely be expected to represent your organization at events, and quite possibly engage in some event planning of your own. Creating and executing a successful event requires skill and effort, as well as the flexibility to manage all the logistical hurdles along the way. It can be stressful, frustrating, and exhilarating—sometimes all at the same event.

So what's the lesson from Phish? Decide your goals, plan the strategy and carefully execute based on a series of tactics. Try to consider every angle possible—and plan for contingencies. Success lies in the details and in considering audience wants and needs.

Introduction to Tactics

Tactics. Output. Mock-ups. Creative materials. Spec pieces. Deliverables.[7]

The terms above are functionally interchangeable, as they simply refer to "the visible element of a strategic plan."[8] These items, when presented in a proposal, should be as polished and "turn-key" as possible so they are ready to go when the client approves them.

The number of communication tactics is limited only by our own imagination, so at the risk of losing some depth, we'll go for breadth in the hope of promoting more comprehensive thinking about the alignment of objectives, strategies, and tactics.

Tactics are broken into five major chunks: owned media, promotions, media relations, digital and social media, events, and outdoor advertising. There's natural overlap between these categories, so we won't be too fussy about defining and confining a tactic to a particular category.

This chapter is less of a "how-to" guide and more of a "when-to" guide. It serves as a starting point to think strategically about the types of tactics that make sense for a given situation. Just as a mechanic knows the tools in their toolbox and when to use them, this chapter is a glance at communication tools, and the circumstances in which they may be deployed effectively. In addition to that basic guidance, there are some links to more comprehensive resources. From there, it's up to you to seek out exemplars and best practices for that particular tactic.

What We'll Cover:

- ★ Owned Media
- ★ Promotions
- ★ Media Relations
- ★ Digital & Social Media
- ★ Events & Outdoor Advertising

Owned Media

Owned media refers to messages that the organization controls—its website and newsletter, for example. Some of the more common types of owned media include newsletters, flyers and brochures, and (yes), direct mail.

A **newsletter** is a regular publication by an organization that combines elements of journalism with more direct personal communication. The etymology checks out: News + Letter. The majority of newsletters are internal, but others might be created for an industry, potential customers, or donors for a nonprofit. They should be used when there's a desire to control the timing and distribution of a specific message and when the audience is too large to communicate with on a one-on-one or small group level.[9] There might not be a need for a newsletter if the audience is small or not overly interested in receiving regular and routine information. First, take stock of the features you appreciate in the newsletters you receive and have those in the back of your mind as you create your own. Use a template if possible. There's no shortage of tips to boost engagement, and universities including UW-Madison and Harvard have also created helpful guides.

Organizational news for the calendar year is compiled into an **Annual Report**. Corporate entities might be legally required to submit quarterly and/or annual reports to the Securities and Exchange Commission, but those reports often go beyond the basic requirements and include information intended to inform and reassure investors. Nonprofit organizations often use annual reports as ways to measure benchmarks, highlight achievements, and drive donations. There's some general agreement regarding relevant content. Whereas annual reports used to be published in glossy booklets, many are now produced digitally.[10] Some companies have taken advantage of the digital format by creating a "Living Annual Report" that provides information in real-time.

Flyers[11] and **Brochures** are stand-alone publications produced by an organization that are typically handed out at events or mailed to a list. Flyers are one page, while brochures are viewed in separate panels. Both can be directed at similar goals—to announce an event or new product, for example—and a choice between the two may come down to how much information you need to share. They are generally best used to create awareness, and also have value later when a customer is preparing to make a decision about a service or product.[12] For flyers, Canva and Adobe have assembled quality lists of best practices and considerations. For brochures, there are traditional bi-fold and tri-fold designs, but also more innovative approaches that make good use of shapes and inserts. There are both digital and physical brochures. It's easy to create a flyer or brochure. It's difficult to create a *great* flyer or brochure.

It's reasonable to assume **Direct Mail** is outdated. It's relatively expensive and not environmentally friendly; the mailing lists are often inaccurate; and people are annoyed by junk mail.

All that might be true, but direct mail is still effective.

Yes, most things are digital now, but *that's the point*. The digital landscape is overcrowded, and so by "zigging" when everyone else is "zagging," your product stands out more. The open rate is higher for direct mail than it is for solicitations via email, which explains why two-thirds of organizations that use direct mail still feel it's an effective component of their outreach strategy.[13] There are a range of ways to make direct mail more compelling, including scratch-offs and QR codes. The U.S. Postal Service created a list of best practices for direct mail, and introduced "retargeted" direct mail, an automated service that sends out personalized direct mail based on the digital behavior of consumers. In other words, if someone interacts with a brand online, that brand can then reach out via snail mail.

Promotions

If you've been camping before, you'll know that firestarters and kindling are the quick and easy way to get a campfire going. Sales promotions work in a similar way. They drive sales—not sometime in the distant future, but right now.

A promotion is any "event, activity or message" that motivates someone to purchase a product or service based on something other than the benefits, physical characteristics, or perceived image of a brand.[14] They are limited in duration, and the cost to the organization should be less than the profit generated.[15] One of the advantages of running a promotion is that it's easier to track success and return on investment (ROI) when compared to other tactics. Promotions can be done in a range of media, including face-to-face interactions at events, in-store specials, and social media posts.

There are countless ways to promote short-term sales. A dozen of the more common approaches include[16]:

- Coupons
  - Most frequently used of all promotional tactics.
  - Physical or digital.
  - Digital offers lower production and distribution costs, as well as the ability to assign unique codes.
- Sampling
  - Best for first-time buyers or to encourage brand-switching
  - Include free downloads, free trials.
- Premiums
  - Exclusive items, known as premiums, are made available to customers for a reduced price (often at cost) following a standard purchase.
- Loyalty programs
  - Have become ubiquitous in recent years—people expect rewards for continuing to purchase products/services.
- Sweepstakes
  - Participants enter for the opportunity to win a prize, based on random chance.
  - Prizes should be attractive to the targeted audience.
  - Opportunity to build a database to use for email and future marketing

    - There are very strict laws regarding sweepstakes that vary by state, and no single federal law governs sweepstakes—different federal laws are at play. Word choice matters. Consider consulting an attorney before you start a sweepstakes.
- Contests
    - Differ from sweepstakes in that skill is involved, rather than random chance.
    - Limited duration, winner selected by judge(s).
- BOGO
    - "Buy one, get one" free promotion is easy for consumers to understand.
    - Good for first-time buyers and to reward long-time customers.
    - Expensive: Selling the product for half-price.
    - Opportunity to move volume quickly and generate cash; stores might offer BOGO specials to generate attention and attract new customers with the hope they will return once the promotion is finished.
- Extra amounts
    - The COVID-era featured "shrinkflation" where brands quietly reduced the amount of product contained in a package. "Extra amounts" is the opposite: The physical size of the product or package is increased, often by 10%, 25% and even 40%.
    - The extra amount should be "sufficient enough to attract attention, but not large enough to destroy profits."[17]
    - Requires new/special packaging that can deliver new messaging.
- Brand demonstrations
    - When someone can't taste or experience a service or product, a demonstration can help sway consumers. Common examples are infomercials for products ranging from knives and home security systems to hoses and stain removers.
    - In-person demonstrations allow for interaction and feedback from consumers, as well as immediate sales. Video demonstrations are better for consistent messaging.
- Cash back
    - Began in the auto industry and spread to banks, credit cards, and electronics.
    - The concept of receiving money back is compelling to consumers
    - Complicated process requiring proof-of-purchase & rebates can be slow to arrive.
- Shared programs
    - Multiple companies work together on a single promotion.
    - Advantage is that advertising costs are shared; connects brands.
- Logo merchandise
    - Items feature a brand logo, which further promotes the brand.
    - Common items include pens, shirts, mugs, keychains, calendars, and tote bags.
    - A type of "behavioral residue," or physical trace left by actions and behaviors that can be persuasive

to others.[18]

Media Relations

As a seasoned reader of the textbook, you know most of this stuff already, but for the sake of a more comprehensive listing of tactics, here are a few key points that fall under the banner of media relations.

A **news release** remains one of the best ways to get preferred messaging out through a respected third party. Be sure you have a strategy for distribution and have targeted your pitch to the best possible member(s) of the media. Have an angle. Know their audience and why that audience would care. *For more, review Chapter 11.*

A **story pitch** must be newsworthy, concise, and compelling. Ideally, you'll have a pre-existing relationship with the media member you're contacting about the story. *For more, review Chapter 10.*

Television remains the best way to reach the greatest number of people simultaneously with a single message. Radio has a smaller audience. Online approaches are more scattered, as people are on different platforms at different times throughout the day. Magazines cater to a niche audience, while newspapers have moved largely to online spaces. Keep these considerations in mind as you pitch different media members on stories and also when choosing media buys.

In creating an ad for media organizations, you're expected to produce a layout, storyboard, or script.

Layouts are used in magazines, newspapers, posters, signs, websites, and printed materials. The layout positions images alongside text to provide a full story about a product.

Storyboards are used in TV ads, short videos, and some social media posts. They are instructional drawings that help to visualize the proposed finished product. A standard storyboard is eight or 12 blank boxes, called frames, that help explain the concept and pacing of the ad.

Scripts are used in radio ads, podcasts, and streaming audio. Scripts are typically a single page, organized in two columns, with the left column describing the individuals involved in the ad, and the right column featuring the spoken words. There are a host of conventions used in scripts, including the use of SFX for sound effects and ANNCR for announcer, but above all, remember that writing for the ear is substantially different than writing for the eye.

Digital and Social Media

Digital media is an umbrella term that includes social media, but also includes brand websites, email marketing, apps, and digital ads.

There is natural overlap between digital media and other categories, as email marketing is a type of owned media and promotions are routinely promoted via social media.

If you suggest an organization undertake a social media campaign, the organization will expect to see sample posts to get a sense of the look and feel of what you're proposing. As a general rule, you'll want to create at least a few representative posts to lend a fuller sense of the campaign. There are a bevy of free online tools to create sample posts for each social media platform, so put those to good use. The closer your sample posts are to the real thing, the easier it is for that organization to appreciate your vision.

Similarly, if you propose a website redesign or refresh, you'll be expected to show what you have in mind. Depending on your relationship with the client, they may provide back-end access to their website where you could create a private site that could go "live" and replace their existing site with a few keystrokes. If not, there are plenty of free online tools to create a mockup of a website. The closer your website is to completion, the easier it is for that organization to move forward with it.

In any case, remember to document the zero point. Use screenshots to capture the "before" and "after" of your work—not only for the client, but for your own portfolio.

For more, review Chapter 8.

Experts Talk Back:

Three Questions with Mary Knight, Communications & Marketing Program Manager at the University of Colorado.

Q: So, you graduated a few years ago, how did you get from there to where you are today?

I did an externship for arts management at a theater in Door County, Wisconsin. I was there for five months. It was kind of a combination of PR and marketing, and general administrative stuff that they needed help with. So I did social media; I helped with press releases; I helped with email communications that needed to go to donors and patrons. I also helped our donor relations team members with some grant writing for some grants the theater was applying for. So kind of a bit of everything, but a lot of writing-focused projects. In terms of straight PR, mostly press releases, but we got earned media through opening nights and things like that, but we didn't do media invites per se or anything like that. It's a big tourist destination and we didn't really need to, which is good I guess.

But I worked there for five months to finish out my externship, and then started at the Performing Arts Center at Milwaukee in December 2017. And my job there was kind of split with 50% marketing, 50% event management and facility management. So in terms of marketing/PR stuff, just a lot of writing—again—and proofing and editing. I worked alongside our PR specialist, so I would work with her on press releases and media alerts, things like that. And then also would work with our social and web people to do web content, social content to promote shows and events that were happening—so a little bit of everything, not just siloed in PR, but always tied to PR in some way. But very writing-focused, and I was then also doing event management.

Then COVID happened, and we were all just 100% remote, and then eventually I got furloughed in May of 2020. And I started looking at other positions, and I kind of wanted to get away from event management altogether and focus more on content creation, storytelling, and writing. So I started working at a small agency just north of Milwaukee in August of 2020. And that was primarily email and social comms, and we also did some PR—mostly just press releases again. So writing and editing those.

And I feel like a lot of organizations don't really flesh out their PR strategy that much. And that sounds bad! But they don't do proactive—in the experience of the organizations I've worked with, it's like "Oh, this person covered us, let's promote it on our website or social or whatever." But not seeking out coverage in advance. Or doing press releases but not more active public relations.

So that was my role at a small agency. I was there for a year, and then I moved in July 2021 to Denver, and worked for an education nonprofit. PR and social media were my two main focuses there, and at that organization we did a lot more active media relations work. So I built up our media lists a lot more, not only the Denver area, but we also had affiliate programs in DC, New York, upper Michigan, and Indiana as well—so helping our partners build up their media lists more, and just researching what outlets and what reporters you need to be talking to, and just fleshing out those lists. I put out a bunch of press releases for announcements of things we had happening. Also in the PR realm, if we had an event coming up where we wanted media to be there, we wouldn't do a formal media alert, it was more like "we want these three news outlets there, so we'll just reach out to our contacts directly over email and say 'this is happening'" and more just pitching them on attending.

And also I worked with Denver 7 (TV). Colorado Apprenticeship month is the month of November, so I did a big news story with them and organized it with some of our employer partners. So that's what I did in terms of PR there, and they were doing more active PR work there.

Because I feel right now with PR—everything is social now—and people are almost kind of scared of PR because we focus so much on social and email and the marketing side of communications. So with the more traditional stuff, I feel like people don't know about it, or are more hesitant to go into it because social seems easier or more straightforward. And social isn't easy (laughs).

In that position, the company was called CareerWise, and I did a lot more media relations things.

I just started a role at the University of Colorado-Boulder, because after going away from event management, my long-term goal was to get back into higher ed. So career-wise it was a good step, because it was education-focused, and I was still looking for that kind of a position in higher ed … My role is more project management of building out comm plans and strategies for various student life departments that are in student affairs and just making sure our designers, photo-video, social, and web people all know the timeline. And I'll be doing some of the website management and content and some writing for social as well, but it's more like an overseeing, making-sure-everything-is-happening-on-time kind of role.

So, I've done comms work, but I've done all kinds of different areas of it, and haven't been necessarily siloed in PR.

Q: You mention using some old-school tactics more frequently than you perhaps expected, but that you're also doing social. What's your experience been like in the balance between those two—and do you feel that some people in your field just assume that social is automatically the way to go for everything?

I would say yes and no when it comes to social. In my last position at CareerWise, it still had a start-up energy to it, since it had only been around for five or six years. There was definitely still a mindset shift that needed to take place around social. I was the first person they had hired that was actually focused on social, and it was only part of my role. So that tells you that they hadn't fully made that shift, that social is an important piece of our communication strategy and our brand message and voice and presence. And my supervisor, the comms director there—they were doing some kind of social media there, sort of doing some public relations work, but it wasn't really active and proactive, so that was kind of the reason for bringing on the position I was in because it was like "we need to have more of a plan around this. We can't just hope someone is going to cover us, and we're gonna get this free coverage."

So I still think that even though PR has been around the longest, and those strategies have been around the longest and could be considered old school, they're still an important piece because on social, it's becoming very hard to get people to see your stuff, especially if you're just relying on organic reach, too, for content. It's a small percentage of even your own followers that will see whatever you're posting because the platforms are just so saturated with users.

So you have to use paid or influencer marketing—that's something we were starting to explore—essentially hiring some of the high school students that we work with that had larger social media presences to leverage them to sell youth apprenticeship, essentially is what we were going to have them do. Because especially for student recruitment, we were like "we could go down the social media ad route," but also, it's obvious that when you see an ad on social media that it's an ad, and so we thought "let's lean more into the influencer route" because then it's a student who's actually gone through the program. It's a testimonial—people love testimonials. They want to know what it's actually like. It builds trust, and it's a real person that's done it, and it feels more authentic than just a paid, very polished ad that we might put out there. And that's why TikTok blew up, because those videos are not super-polished—an ad studio didn't create those videos. It's just regular people talking for 30 seconds or more, in their house, dressed casually—whatever—it's not overly produced. Especially for Gen Z, they want that authenticity. They want to know that it's a real person talking to them...

PR tactics are still incredibly useful. It's like "do people still send out press releases?" Yeah, they still do. It's still important.

I think it's more important to focus on not just the part of writing the press release itself and making sure it's well written, but also make sure you've done your research, and your media list is up to date, and you're actually reaching out to reporters that write what you're writing about, and you're reading their articles so you can reference them when you're pitching them, so it's more focusing on the tactic to actually get the piece of writing and the story out, and making sure those lists are good.

Q: What advice would you have for PR and Strategic Communication students as they're getting ready to graduate and enter the workforce?

I would say to absorb as much knowledge as you can. It's still that environment where you need to know a little about a lot of things. It's good to specialize, but it's good to have an overarching knowledge of everything, which is hard to do—especially with social, which is always changing. But learn as much as you can. If you think it's something you might not be interested in learning more about in the comms realm, just take the class or do the internship. Just be very open. Because it all ties together. It's very intersectional. And when you're eventually on a comms team, or a PR team, or a marketing team, it's just by nature a very collaborative environment usually. I feel that unless you're in a really small organization, you're never going to be a team of one. Especially because brand management and reputation—all that stuff is so important. And we've all been dealing with so many crises over the past, I don't know, two to five years, I feel like a lot of companies are realizing you need to have a large team to communicate out, whether it's social, through the media, whatever it might be.

So learning as much as you can and then being a team player, and helping where you can. Because it's usually a group effort. And that's a good thing, especially when you're branding something new, or coming out with a new campaign or something, you want to have a diversity of viewpoints and perspectives because you want to make sure you're being inclusive, you want to make sure your message resonates with all different types of people—you never want to be working in a silo, especially now in this climate. DEI is so important, as it should be, and you need to make sure you're listening to everyone.

Events and Out-of-home Marketing

Scheduling and promoting an event requires thoughtful planning and attention to detail. There should be communication before, during, and after the event.

As far as planning goes, consider the lead-time necessary for success—and be realistic. If you have a single date for a single event, work backwards from that date when creating deadlines for action. As far as attention to detail goes, consider the following layers of the experience[19]:

- **Anticipation**
  - Marketing materials should build excitement and set expectations.
  - Always list the time, date, and place (*If you're notifying the media, those details are always presented in that exact order*).
  - Include relevant details: Will it be a free or paid event? Are tickets required? Be sure to add a QR code or website for additional information.
  - Of course, you'll promote the event through your own channels, but leverage other media outlets that promote event listings, such as newspapers, magazines, trade journals, television, radio, wire services, social media groups, and media websites.[20]
- **Arrival**
  - Ensure the arrival of attendees is smooth and safe.
  - Consider transportation requirements and ensure ADA compliance.
  - Have clear signage and friendly greeters. First impressions set the tone.
- **Atmosphere**
  - Consider the venue, and how to optimize the space provided. If the venue is too small, attendees may feel cramped, and if the venue is too large, the event may be perceived as a failure.
  - View it from the experience of the guest: Where are the restrooms? Where are the trash and recycling bins? Does décor need to be brought in, and if so, what feelings do you want to evoke—is there a theme? Make sure you consider all the options: Are there enough food and drink stations? Enough places to sit? Details matter.
- **Appetite**
  - Offer food and drinks appropriate for the occasion that fit within your budget. If the event is catered, how far in advance does that need to be arranged?
  - Think about whether guests will be standing, seated, or moving around, as that may dictate whether hand-held snacks make more sense than "messier" options more fit for a sit-down meal with proper cutlery.
  - Consider different potential allergies, religious or philosophical preferences and dietary restrictions, and offer alternatives for attendees. Consider having people register online—even for free events—to capture dietary needs. It's not acceptable to tell vegetarians or vegans to "just eat the

sides." There should be a main dish appropriate for their needs.

- **Activity**
    - Create a progressive experience, with a strong start and finish.
    - Consider focal points within the space for activities and interaction.
    - Will attendees watch or participate?
    - Will activities be structured or impromptu?
    - The theme of activities should tie back to the goal of the event.

Out-of-home marketing, also known as Outdoor Advertising refers to advertising placed in prominent public spaces. The idea is that you meet people where they're at. There's typically a need to grab someone's attention quickly—especially if they're flying down the road at 75 mph—so outdoor advertising tends to rely on clear images and limited text.

The Economist, a weekly publication based in the U.K., had some fun with the idea of limited text in their advertisement:

You have to understand the rules before you can successfully break them, as The Economist did with this advertisement by AMV BBDO.

Common examples of outdoor advertising include:

- Billboards
- Bus benches and shelters
- Gas stations and convenience stores
- Hotels
- Airports
- Movie Theaters
- Shopping malls
- Sports venues
- Taxis and ride-share services

- Vehicle wraps

Photo by Owen Barker via Pexels.

We'll get more into best practices for visual communication in Chapter 15, but for now, just know that such options are available.

Summary: Putting it All Together

Proposals and campaigns begin the science—the situation analysis—and end with the art of developing and implementing tactics.

Tactics are the visible part of a larger plan. They should incorporate the tips and tricks mentioned throughout the text with respect to framing and phrasing in a way that connects with the audience.

A common mistake is developing tactics before solidifying a strategy. Even if those tactics prove to be the correct ones to execute in the long-run, a haphazard application is never as effective as one that is purposive and methodical. Begin with the goal, move to your objectives, consider the strategy, and then utilize the tactics to fit the situation.

You should be able to reverse that process as well, and say to yourself that "this is the best tactic to enact that strategy, and that strategy is the best option to meet a particular objective, and that objective provides reasonable benchmarks and deadlines to meet our overall goal."

Tactics are the last thing you'll present to the client in your pitch. They're what everyone wants to see, and are proof that you can do more than talk the talk—you can walk the walk, by producing polished, high-quality deliverables that may be acted upon.

Media Attributions

- The Economist ad
- Outdoor advertising © Owen Barker is licensed under a Public Domain license

Notes

1. Smith, R.D. (2017). Strategic Planning for Public Relations, 5th ed., Routledge: New York. Page 257.
2. Rule #6 in: Alinsky, S. (1989). Rules for radicals: A pragmatic primer for realistic radicals. Vintage.
3. The original Woodstock festival is generally regarded as the first major multi-day festival that was successful by some metrics, but fell short on logistics. The "Us Festival" in the early '80s, put on by Steve Wozniak, had 400,000 attendees over three days, but lost several million dollars. Desolation Center, a non-camping festival, bussed attendees to a remote desert location (featuring bands like Sonic Youth and The Minutemen), and is credited for inspiring later festivals such as Lollapalooza and Coachella. There's a 2018 documentary on Desolation Center, and for more background, check out: https://thehundreds.com/blogs/content/desert-diy-desolation-center-stuart-swezey
4. "After Midnight: Phish's Big Cypress Festival," [Podcast] Episode 1, "The Plan." Anastasio credits the Bread and Puppet Theater in Vermont (an outdoor festival of puppetry shows in the '70s) for serving as an exemplar of patient pacing at a festival. [Breadandpuppet.org]
5. Sold for $10 at the concert, those prints are now worth more than $1,000: https://expressobeans.com/public/detail.php/7768
6. "The Clifford Ball," (1998), Phish.net, Retrieved from: https://phish.net/faq/clifford-ball
7. Collateral is another related term, but that typically refers to a collection of brand-related materials such as a high-res image of the company logo, so it was not included here.
8. Smith, R.D. (2017), Ibid., p. 257.
9. Smith (2017), Ibid.
10. "Nonprofit Annual Reports," (No Date.) National Council of Nonprofits. Retrieved from: https://www.councilofnonprofits.org/running-nonprofit/fundraising-and-resource-development/nonprofit-annual-reports
11. The AP Stylebook changed usage rules for "flyer" vs. "flier" in 2017. Now, Flyer refers to both handbills and someone flying an aircraft. Flier is now limited to a phrase such as "take a flier," meaning to take a risk. That change was a relatively large one in the world of grammar, with one person commenting: "I spent 30 years changing 'flyer' to 'flier.' All my work was in vain." (Facebook user Julie Williamson in response to the AP Stylebook post from 7/7/21.)
12. "How to create and format a brochure," (n.d.). Foleon, Retrieved from: https://www.foleon.com/topics/create-format-brochure
13. Kuligowski, K. (Oct. 20, 2023). "Direct mail marketing guide for small businesses," Business News Daily, Retrieved from: https://www.businessnewsdaily.com/15776-direct-mail-marketing-guide-for-small-businesses.html

14. Juska, J.M. (2018). Integrated Marketing Communication: Advertising and Promotion in a Digital World. Routledge: New York. Page 162.
15. As Juska, Ibid., put it: “There is only one simple rule: The cost of a promotion should be less than the incremental sales and profit generated, unless the activity is only limited to a competitive response to lower prices or new brand introductions.” (Page 163).
16. Each of these examples comes from Juska, Ibid., but others he mentions are omitted here.
17. Juska, Ibid., p. 168
18. Behavioral Residue goes beyond logo merchandise, and includes things such as the Like button on social media platforms. Concept from: Berger, J. (2016). Contagious: Why things catch on. Simon and Schuster.
19. “Event Planning Basics,” (2014). Sam Houston State University. Retrieved from: https://www.shsu.edu/dotAsset/c2d30379-5d0a-4d95-b98b-365fc5700c91.pdf. Note: SHSU developed the “6 A’s” list, and some of their rationale is included here, but I’ve added other considerations not mentioned in that document.
20. This list comes from Smith, R.D. (2017). Becoming a Public Relations Writer: Strategic Writing for Emerging and Established Media, (5th ed.), Routledge: New York.

14.

CRISIS COMMUNICATION

Nathan J. Rodriguez, Ph.D.

"We are advocates. We are in the business of changing and molding attitudes, and we aren't successful unless we move the needle—get people to do something. But we are also a client's conscience, and we have to do what is in the public interest."
—Harold Burson[1]

"Everybody has a plan until they get punched in the mouth."[2]
—Mike Tyson

First, a Story…

Chicago. Late September, 1982.

Twelve-year-old Mary Kellerman had a lingering head cold, so after convincing her dad to let her stay home from school, she went to take a capsule of Extra-Strength Tylenol. Her dad watched her go into the bathroom, heard a cough, followed by something falling to the floor, and asked her if she was okay. Mary didn't respond. He opened the door and found her on the floor. She was raced to the hospital, but it was too late—shortly after they arrived, Mary was pronounced dead.[3]

Her parents were baffled, because Mary was otherwise a perfectly healthy middle-schooler. They figured she must have had a stroke.

The next morning, 27-year-old mailman Adam Janus experienced some slight chest pains and took a couple of Tylenol. He fell to the floor and died shortly after the paramedics arrived. Doctors told his family that he likely died of heart failure.

The Janus family had relatives visit to pay their respects. Adam's younger brother Stanley, and sister-in-law, Theresa, were newlyweds. Stanley suffered from chronic back pain, and had a headache, so he reached for the bottle of Tylenol, and also offered some to Theresa, who also had a headache. Stanley collapsed shortly after, and by the time the ambulance arrived, Theresa had collapsed. Both died.[4]

Chuck Kramer, a firefighter who responded to both calls from the Janus household, told the other paramedics, "Guys, this isn't heart attacks. There's something wrong."

Kramer called Helen Jensen, a nurse who was the only public health official in the Chicago suburb, to help investigate. After hearing the story from members of the Janus family, she found the Tylenol bottle on the counter in the Janus home, and the receipt in the trash can. After pouring out the contents of the bottle—counting 44 capsules out of 50—she determined each person likely took the recommended dosage of two pills. Jensen concluded it must have been the Tylenol, but her conclusion was met with skepticism.[5]

Authorities eventually connected the dots and discovered cyanide in the Tylenol, but not before six otherwise healthy people in the greater Chicago area had also died within a 24-hour span. During a press conference, the public was advised to avoid taking Tylenol until further notice.

An additional investigation found that tampered pills were purchased from a handful of stores in the Chicago area. The tainted capsules were produced by two different manufacturing plants, which meant the capsules were tampered with after they were on store shelves. It was, in short, an act of terrorism. Someone took the bottle off the store shelf, added potassium cyanide, and returned the bottle to the shelf to kill people and terrorize the community.

The manufacturer, Johnson & Johnson, had a crisis on its hands. A leading expert in advertising said he didn't believe Johnson & Johnson would ever be able to sell another product under the Tylenol brand.

He said: "There may be an advertising person who thinks [they] can solve this, and if [Johnson & Johnson] finds [them], I want to hire [them]…to turn our water cooler into wine cooler."[6]

Public faith in the widely used drug crumbled, and reports showed—within days—that Tylenol went from enjoying 37% of the market share to about 7% of the market share for pain-relief medicine.[7]

It would not be enough to deny responsibility and blame the deaths on a random act of terrorism.

Johnson & Johnson halted all production and advertising of Tylenol. It issued a nationwide recall of every Tylenol bottle in every store, which created a loss of more than $100 million in retail value.[8] It coordinated investigative efforts with the FBI and Food and Drug Administration. The company used paid advertising to print coupons in local newspapers to cover the cost of a new bottle of Tylenol. It also offered to replace, "free and without asking for proof," any bottles that consumers may have thrown away.[9] Most importantly, Johnson & Johnson announced that all Tylenol bottles would now feature triple-sealed, tamper-resistant packaging.

Finally, these announcements were not made at a single nationally televised press conference, as might be expected. Rather—under the guidance of Harold Burson and the Burson-Marsteller PR agency—Johnson & Johnson executives opted to have 30 different press conferences, linked via satellite, with reporters from the largest regional markets. A technological feat at the time, it also served to localize the story and guaranteed front-page coverage of the story around the country.[10] It didn't hurt that the CEO of Johnson & Johnson praised the media for its role in helping disseminate information.[11]

By September of the following year, Tylenol was once again the most popular pain reliever, and it was "almost as if nothing ever happened."[12]

And remember that "leading expert in advertising" who made the "water cooler into wine cooler" comment? The advertising agency responsible for Tylenol shipped him a water cooler filled with wine.[13]

Nearly a half-century later, Tylenol remains as popular as ever, but the so-called Tylenol Murders remain unsolved.[14]

The Takeaway

There are many incorrect ways to respond to a crisis. Johnson & Johnson navigated the crisis so well that its approach is widely regarded as one of the first "textbook" responses to a crisis.[15] By incurring a significant expense of removing existing products from stores, and giving away future products, the company exceeded expectations in a public manner. It was transparent in its actions, and successfully restored public trust in Tylenol.

A crisis is a defining moment for any organization, and it puts a spotlight on ethical behavior. In most cases, publics may not care that much about the cause of the crisis, but they will care about how the organization responds. It's one thing to have feel-good mission and vision statements—it's another to follow those when the going gets tough. When it *really* matters: Are you the organization you claim to be?

Introduction to Crisis Communication: Problem or Crisis?

Public Relations and Strategic Communication involves building relationships with key audiences by cultivating an appealing personality, image, and reputation. A crisis threatens to upend that work.

So, what is a crisis?

A **Crisis** is defined as a specific, nonroutine, unanticipated, and uncontrollable event—or series of events—that jeopardize relationships with key stakeholders and threaten the goals of an organization.[16]

Breaking that definition down, the symptom of a crisis would be described as acute rather than chronic; it doesn't refer to the gradual degradation of a public image over months or years. It's sharp, dramatic, and specific. It's not part of a day-to-day routine, so a crisis generally disrupts normal business operations.

It's unanticipated, which means that the organization is caught off-guard. "Unanticipated" is not the same as "unexpected" or "unpredictable." To anticipate something entails acting in advance of that occurrence. For example, a data breach is common enough that an organization may not be completely shocked that it could possibly occur—rather, steps have not been taken regarding a potential breach, so it's an unanticipated event. In that sense, a crisis is "risk manifested."[17]

It's also uncontrollable; it defies a quick fix and easy solution, and is an "all-hands-on-deck" moment that demands additional time, resources, and strategic thinking to resolve. Finally, it places stress on relationships with critical stakeholders, resources, and audiences that are essential to an organization achieving its goals.

When each of those factors are at play, the crisis is underway. A crisis threatens the values, goals, and resources of an organization.[18] Anything less than a crisis is a problem—and it may be a significant problem—but it can be handled without putting everything on hold until it's resolved.

Some of the more common crises are related to public perception, sudden market shifts, product failures, top management changes, cash shortages, industrial relations, and adverse international events.[19] There are also crises that are not organizationally based events, such as regulation or deregulation of an industry, or even a natural disaster—but the organization itself is not viewed as responsible for the act.[20]

Crises may be unpredictable, but PR and Strategic Communication Professionals should know that the best time to plan for one is before it even starts. This chapter focuses on crisis communication as it relates to protecting an organization's image and relationships with key audiences before, during, and after a crisis. It expands upon different aspects of ethics and relationships, as well as elements of storytelling and persuasion.[21]

Photo by Tima Miroshnichenko via Pexels.

What We'll Cover:

- ★ Blame Narratives

★ Image Repair Theory

★ Alternative Responses

★ Best Practices

Blame Narratives, Counter Blame Narratives & SCCT

Crises tend to start with an exigency or situation marked by urgency. Due to the unpredictability of this event, publics, stakeholders, and news media tend to focus on who or what caused the exigency. As such, one way to understand a crisis is that it can be viewed through the lens of a blame narrative.

Blame Narratives began with the ancient Greek notion of *Kategoria* (an accusation or charge), in which an accuser lays out an alleged act and set of facts to support the assertion. The story includes protagonists, antagonists, and a plotline with a sequence of events that assigns blame to an individual, and asks the audience to adopt the accuser's viewpoint.[22]

In essence the same thing happens in a crisis, as a prevailing narrative establishes two elements. First, an act occurred, which is offensive. Second, the accused is responsible for that act. Both elements must be viewed as true by an audience for the organization's reputation to be put at risk.[23]

A **Counter Blame Narrative**—or a persuasive defense—must therefore address both of those issues.

A key part of **Situational Crisis Communication Theory** (SCCT) is that a crisis response should be proportional to the level of responsibility an organization has for the offensive act.[24] It is appropriate to focus on responsibility for the crisis as an audience-centered approach. At the same time, the focus might prioritize reputational threats to the organization over the actual damage to publics in a crisis, who may have had very real harm done to them.[25] For that reason, it's useful to adopt an Outward Mindset[26] that emphasizes the importance of ethics and building durable relationships.[27]

Life Cycle of a Crisis

A crisis has a beginning, middle—and, thankfully—an end.

The **Proactive** state involves monitoring the situation and preparing crisis plans. The **Strategic** state is when an organization knows a crisis is possible and communicates with stakeholders to position itself strategically. Beyond a "point of no return," and once the crisis has arrived, the **Reactive** state is the actual response to the crisis, in terms of management and communication. Finally, in the **Recovery** state, things begin to return to normal.[28] Knowing these states may not help during a crisis, but it can be comforting to understand how they typically unfold.[29]

Crisis Responses: Image Repair Theory

In a crisis, an organization has a range of options that basically come down to one or more of the following responses: "We didn't do it;" "It wasn't our fault;" "It wasn't that bad;" "We fixed it;" and "We're sorry."[30]

Here, we'll dress up those ideas a little bit, and refer to the five general approaches as **Denial**, **Evading Responsibility**, **Reducing Offensiveness**, **Corrective Action**, and **Mortification**.[31] Within those categories are a couple dozen different responses, so in the interest of time and space, we'll cover those in some quick bullet points.

Denial[32] ("*We didn't do it*")

Denial refers to responsibility for the act. It's not denying something occurred, or denying a crisis exists—it only addresses the notion of blame.

- Simple denial
  - We're not responsible for the act.
- Shift the blame
  - Another person, group, or organization is responsible for the act.

Evading Responsibility ("*It wasn't our fault*")

When denying responsibility for an act is not feasible, there are four basic ways to reduce the burden of that blame.

- Provocation
  - The act was justified, because it was in self-defense.
- Defeasibility
  - There was a lack of information and/or lack of control in the situation.
- Accident
  - It was a simple mistake, done without intent.
- Good intentions
  - We inadvertently did something bad while trying to do something good.

Reducing Offensiveness ("*It wasn't that bad*")

Reducing offensiveness does not address responsibility for the act; rather, it addresses the severity of that act. There are a handful of ways to minimize the negative feelings that stakeholders and audiences have regarding a situation.[33]

- Bolstering
  - Strengthen positive feelings toward the organization by reminding the audience of past good deeds
- Minimization
  - The act is not as offensive as claimed: It's not that big of a deal.
- Differentiation
  - Distinguishes the act from a similar, less desirable action: Doing so redefines the act as less offensive
- Transcendence
  - Places the act in a different, more favorable context that emphasizes a different value
- Attacking the Accuser[34]
  - Directly
    - Calls into question the credibility of the accuser, or source of the accusations by name
  - Indirectly
    - Attacks the "statements, actions, policies, or associations of the accuser" to reduce their impact[35]

Corrective Action ("*We fixed it*")

Corrective actions involve a promise to correct the problem and to make changes to prevent something similar from occurring in the future.

That promise must be followed by substantive actions that live up to that promise, or it risks compounding the issue further

Mortification (“*We’re sorry*”)

According to Kenneth Burke, mortification involves a sincere apology where the accused admits responsibility and asks for forgiveness. From an ethical standpoint, if the accusations have merit and the organization is the culprit, it’s tough to argue against mortification.

On their own, the words “I’m sorry,” or “We’re sorry” do not constitute mortification. When offering an apology, first consider what you’re apologizing for, to whom the apology is owed, how to apologize, and when to apologize.[36] It’s been suggested that an authentic attempt at mortification includes:

(a) taking responsibility;

(b) emphasizing the harms caused;

(c) asking for forgiveness

(d) admitting a lack of excuse or justification;

(e) confessing feelings of shame or embarrassment[37]

Even if all five of those elements are not present in a response, emphasizing some of those aspects can result in the audience accepting the apology as authentic.

One potential drawback—depending on the circumstances—is that claiming responsibility may expose the organization to legal action. Even though it may be a common human response to say “I’m sorry,” before using mortification in public, consult with senior leaders and lawyers.

To summarize Image Repair Theory, “Denial and evading responsibility address the *belief* component of the attacks. Reducing offensiveness concerns the *value* involved in an attack. Corrective action and mortification attempt to create *new beliefs* to repair the image.[38]

Alternative Actions: Creative Responses to a Crisis

The list of actions in the preceding section is comprehensive, but not exhaustive. A situation will often demand that an issue is addressed directly, but there are occasions where a more creative solution is the best approach. Other ways of handling a crisis include what we’ll refer to as inaction and indirect action.

Inaction—not responding or not communicating—is an active choice.[39] In some cases, it may be the best course of action. The interview in the next section is with Chris Thomas, the head of a nationally renowned agency that specializes in crisis communication, and he explores that idea a bit more. For now, bear in mind that inaction is a conscious decision that might be a prudent option.[40]

There are also instances in which addressing a crisis head-on is less than ideal, but rather than inaction, you opt for **indirect action** and find a “side door” that gets you where you need to be. To lend a sense of what the heck that means, here’s an example from Bernays:

“A nationally famous New York hotel found that its business was falling off at an alarming rate because of a rumor that it was shortly going to close…Few things are more mysterious than the origins of rumors, or the credence which they manage to obtain. Reservations at this hotel for weeks and months ahead were being canceled by persons who had heard this rumor and accepted it implicitly…

[T]his rumor…had no foundation in fact…[D]enial…would accomplish little. The…only way to overcome the rumor was to give the public some positive evidence of the intention of the hotel to remain in business. It happened that the maître d'hotel was about as well known as the hotel itself. His contract was about to expire. The public relations counsel suggested a very simple device.

'Renew his engagement immediately for a term of years,' he said. 'Then make public announcement of the fact. Nobody who hears of the renewal or the amount of money involved will believe for a moment that you intend to go out of business.'

The maître d'hotel was called in and offered a five-year engagement. His salary was one which many bank presidents might envy. Public announcement of his engagement was made. The matire d'hotel was himself something of a national figure…The story was one which immediately interested the newspapers. A national press service took up the story and sent it out to all its subscribers. The cancellation of reservations stopped and the rumor disappeared."[41]

First: Bonus points if you know the name of any maître d at any hotel in town—so let's just acknowledge that times have changed. But this anecdote is classic Bernays: Instead of issuing a straightforward denial that could have given life to an incorrect rumor, he unearthed a creative solution through indirect action.[42] Put another way, he used the side door. In the 21st century, there are ways to use the side door to address a crisis ranging from leaking information to the media or using social media to send information to influencers. Rather than issuing an official response, the idea of indirect action is to have key publics or stakeholders address the crisis in an unofficial way.

Experts Talk Back:

Three questions with Chris Thomas, president at Intrepid Agency in Salt Lake City.

Intrepid offers a range of strategic communication services, and specializes in crisis communication, having represented hundreds of clients. The firm has worked with multiple Fortune 500 companies, and Thomas is perhaps best known for his work in the Elizabeth Smart ordeal. He also serves as judge of the "PR student of the year" contest in Utah.

Q: So, 20 or 25 years ago, the media landscape was different. It was more monolithic in nature with people reading the paper, and generally sharing common sources of news and information—and now it's splintered. We have our own niche interests, and get news and information based around those existing interests. There's also the coarsening of public discourse and inability of some people and entities to feel a sense of shame. And I may be just wrong, or not appreciating all the dynamics at play, but it seems what constitutes a crisis, and the impacts of that crisis may be different now.

The reason I say that is in a lot of classes, I open with a discussion of current events from a PR perspective, and there will be a full-blown crisis in an area that a student is interested in, whether it's cosmetics or sports or whatever—and it's seen by them as a huge deal, and for fans of that thing as a huge deal. But if I ask how many people in the class knew about this incident beforehand, hardly anyone else does, and so it doesn't seem as though there's as much of a spillover effect from one industry outward. I don't know: Is that a fair assessment, or not, and does this change how you approach a situation?

Things have changed drastically in the last 20 years, and I mean drastically. Breaking that down a little bit, changes in the media change crisis communications as well.

We used to have reporters for every major beat, and now most journalists are generalists: They cover everything. We had journalists 20 years ago who had been in the industry for 30 or 40 years and really practiced their craft. I mean, I was a journalist initially out of school, and still have great respect for the few that are still around that really, really do their job. Not that they aren't—I just think they're stretched so thin.

So, we now have fewer journalists doing more, who are younger, with less life experience and less journalism experience. And so, years ago in a crisis situation, oftentimes it was—you know, we still try, but—we could sit down with a grizzled, veteran journalist and have a really detailed conversation because they understood the industry, they understood how business works, and we could really help them to understand the issue, how our client was involved with it, and how they were addressing it.

Now, so often there's such a lack of background and understanding, and such speed to get the story out online. It's often hard to have those conversations because crises usually are gray; they're not black and white. And so being able to explain the nuance is really important. So that's really difficult. The other thing is social media has made it so incredibly challenging because just about anyone can be a journalist now, and just about anyone can take that megaphone and go out and parrot to the world, whatever they want to parrot.

It's really interesting because things that weren't news in the past are news now, and things that probably should be news aren't. So, you're dealing with just this weird thing where—and this probably doesn't work with what you're doing, but there was that Bizarro World episode of *Seinfeld* years ago. It's kind of bizarro world now. Like, how did we get here?

So, from a crisis standpoint—I mean, we've managed more than 300 crises in the last 20 years through different industries, and I can't say we've done everything, but we've done a lot—and we get a call, one of the first things we're often doing is going to social media. Right off: What's on social, and how is it being portrayed? I have so little control over what's going on on social; it's really difficult from a client standpoint in that, yeah, there's a thousand people that are being reached by this message from this nut, and you're going to amplify it by responding to them. And so, you have to just be very selective on how you respond online. And you have to be very smart about how you do it.

One of the big mistakes a lot of crisis communications folks make—I think it's important for your students to understand—is that the first place they used to go is to the media. Now, I think it's social media, and it's responding to those, instead of taking a step back and being strategic: Who are our audiences, and how does this impact those audiences? And how do we make sure that we are communicating with these audiences?

I can't control what's going on on social media, but I can have some control over my board, over my customers, over various people. So how are we going to communicate proactively or reactively with these groups? And sometimes the public response is pretty minimal compared with what we're doing with each of these audiences where we have an influence...There are many, many audiences where your communication with that key audience is much more important than what you say publicly.

Q: So do you feel there's been a shift perhaps, in "maybe we don't need to respond as quickly to all these audiences as we did in the past, maybe we just kind of let this one go," especially on social media, where you have maybe a couple of accounts that are making a big fuss, and like you said, you'd just be drawing attention to it by responding.

How do you make that determination? I imagine there are so many elements at play, but what are some of those key determining factors as to whether or not you really want to interact or engage with those folks online on some of those grounds?

Well, you bring up something we talk about all the time with our clients, and that's what we call "breaking into jail."

Crises are emotional—very emotional—and the way in which you manage them best is to take the emotion out of it and look at it rationally. So, we do a lot of psychology work where it's like, "Okay, I know you're really pissed. And I know most of this isn't true, or that it's having a significant impact. But we've all got to take a deep breath here, and we've got to look at this rationally and responsibly."

And it's nice coming in as a consultant: A lot of the companies that hire us, whether it's legal counsel or it's communications, because we're an outside party who has significant experience, their top executives listen to us. So being able to go in, and from our experience, say "Hey, if you respond to this—and I feel we have this conversation a couple of times a month—if you respond directly to this, right now you've got 60 comments and 150 people engaged, and it's going to increase probably 10- to 20-fold. And it's not going to increase the way you want it to increase.

Now when it hits a certain point, it makes more sense. The other thing I often like to do too is just "everything depends." Everything. There's not a set formula. Some of it's from experience and collaboration and figuring out what the repercussions are.

It's the same thing with the audiences—are we going to be proactive or reactive with a certain audience? Do we need to reach out—are we that concerned? Or are we going to make sure that all of our frontline—all the people who interface with these audiences— know what is going on?

Sorry, I'm going to go off on a few tangents before we bring it back. Internal is the most important audience in most crises, and it's also the most overlooked. Research has shown that most people in an organization where there's an issue, they want a general idea of what's going on, and instructions on what to do if they're confronted with it. If you can answer those two questions—of course, everybody wants to know more than you're able to tell them, but it's like: "You're not communicating anything with us. And I'm getting a call from our customers, and I don't even know what to tell them." It puts them in a really demoralizing position. That's why you see with serious crises generally, there've been studies done that show it has a significant impact on retention. So, that internal audience is making sure "what do we say?" We don't want to alarm people too much, but we also don't want them to be caught off-guard, and who do we tell, who don't we tell. It's very surgical, usually. Occasionally, you'll have what we call a red-level crisis where it's just nuclear, and at that point it's very different, but usually everything is very, very surgical in how we respond to it.

We're always asking the question, too, with social: "Who is this influencing? And are there things we need to do to communicate with them? I'll go on one more tangent.

I had a client we worked with that's very well-known. If I said the name, of course you go "aha." But for confidentiality reasons, I'm not going to mention them. This was 10 years ago, so it's a little dated, but they were involved in a significant story that was on the front page of the *Salt Lake Tribune*. It was pretty ugly. And they hired, at the time, Dan Jones and Associates to do a survey. So, they surveyed 500 people that day regarding the situation—and this is when people read the paper a lot more than they do now. Less than 5% of the people they called knew about the story, and of the people who knew about the story, it was about 20% who cared about the story. So, if you break that down, it was 1-2% of the population that was concerned with it. So that was something that was used a lot. A lot of money was spent on that research, but it helped guide a lot of what was done from there on out: Is this impacting 5%? Are we just amplifying it by coming out—is this a one-day story? Is this a three-week story? What do we do, and how do we respond to it?

So, I think we're even more siloed now than ever before. And it's surprising how often people don't know about major news events, let alone crises. And the only way they know about them is if we let them know. So again, it's hard to answer that question, but some of it is from experience. A lot of it is circumstantial, and some of it's just from feel. One of the most important things I always tell people in crisis communications is to listen to and trust your gut.

Q: What advice would you have for students who are interested in Strategic Communication and will be graduating and entering the field in the next few years?

First and foremost, experience is key. Experience is everything. I recommend, even as a freshman, starting to get experience. The more volunteer opportunities, internships, shadowing—anything you can do to learn—is going to help you get ahead and is going to provide opportunities because that's how you build a network.

It's kind of rare to see students now that are proactive, and saying "Hey, what do you do, and how do you do it? Do you have an internship where I can shadow you?" And I get that it's scary to ask for that. It's rare to see students at PRSA events where there's opportunities to learn firsthand.

So, I think it's really important to work with a variety of people as a student before you graduate, and have a portfolio with at least two or three pretty solid, different internships or volunteer opportunities that you can demonstrate—because that's what I look for in an interview. I don't care about your grades. I usually don't care too much about where you went to school. I really care about what you've done, and your initiative, and whether or not you can come in and contribute to my organization.

The other thing I would tell you—and I think this is a huge mistake I've seen in recent years—is once you get the job, treat those first two to three years as a graduate course in communications. Don't treat it as a job. And I know this from experience because this is what I did: I got a job at an agency, and I would spend my lunchtime, my after-hours, and weekends. And I wouldn't re-do everything, but I was the small guy doing the grunt work, and I would be in the meetings where they were talking about this proposal they were developing, or the release that's being written, or whatever it might be. And I would go off on my own and write the release, or write the proposal, and then I would compare it with what they did, and quickly someone found out what I was doing, and I soon had a mentor that was like, "Oh, bring it to me, and let me look at that." I put a lot of extra time in, but it paid huge dividends.

What I'm seeing a lot of right now is getting into a job, and then six or seven months later, you want to jump somewhere and want to do something else. There just isn't this stick-to-it-iveness…It really takes a couple of years to get everything you can out of that, and if you do that, you build this foundation…But I think so often there's kind of the short, immediate focus versus really looking at the long game. And the students who are looking at the long game and getting really good experience in those first two to three years, and are sticking in a place are 10 times more valuable 5-to-10 years into their career than those who are jumping around.

Best Practices

A recurring theme when speaking with practitioners is that to be successful in Public Relations and Strategic Communication, you need to remain current—not just on best practices in the field while executing tactics, but remaining current on news and information.

First: Prevention is the best cure. When you're scrolling through your newsfeed with the organization in mind, you're low-key engaging in **environmental scanning**. Environmental scanning is the process of actively seeking information regarding relevant relationships and events that might help a company move forward.[43] It's quite similar to a situation analysis, but may instead be thought of as an ongoing refinement of your understanding of that situation. This is sometimes referred to as "issues management,"[44] and the rationale is that by being proactive, issues can be identified before they evolve into a problem—or a crisis. Environmental scanning is an early warning system that can warn of potential danger.[45]

Spokesperson Quick Tips

Situations often require someone to serve as the public face of the organization. Here:

- Follow best practices for public speaking.
- Stay on message.
    - Remember the "ABC" method from Chapter 4:
        - Acknowledge the question.
        - Build a bridge from the question to the point you want to make.
        - Communicate your message.
- Create an atmosphere of cooperation, transparency, and sincerity.

Once the crisis has arrived and a response is required, it's helpful to follow the following five guidelines[46], [47], [48], [49]:

- React quickly
    - Establish monitoring tools and a response team.

    - Pause scheduled content, and focus on crafting content that's relevant, shareable and understandable.
- Inform internal publics
    - Often a "forgotten audience" during a crisis, employees—especially those who interact with the public—need to have a sense of what's going on, and what they should do. Some employees and crises require more details than others.
        - For employees, hearing bad news about their employer from a media report erodes trust within the organization.
- Be consistent and coherent
    - Focus on a key message—what you want the audience to remember—build around that, and return to it.
    - When you take a stand on something—unless you're completely, demonstrably wrong—stand tall. Because "reversing course, hoping to placate the angry mob…often…simply angers everyone—supporters feel betrayed; opponents feel victorious, and everyone walks away feeling badly about the brand in question."[50] A quote attributed to Abraham Lincoln reinforces this: "Be sure you put your foot in the right place, then stand firm."[51]
    - Speak with one voice: Whether it's a spokesperson or an online team, everyone should be working from the same set of facts and conveying. the same message.
- Focus on relationships
    - Keep stakeholders and key audiences informed: Their support will be needed during and after the crisis.
    - Know who you can go to, whether it's a preferred member of the media to pitch a story, or a colleague or mentor for advice.
- Learn from the crisis
    - It can be tempting to walk away and try to forget the crisis. Instead, do a "post-mortem": Evaluate the response and how it could have been improved. Questions to ask include:
        - Were our actions consistent with our values?
        - What did we anticipate—and not?
        - How did employees perform?
        - What lingering effects are there from the crisis?
        - What are the next steps?[52]

Lemonade from Lemons

A crisis is bad—but it doesn't have to be entirely bad. In a crisis:

- **Heroes are born**: If you know how to survey the landscape and respond appropriately, the executive team can understand first-hand your importance to the organization.
- **Change is accelerated and latent problems are faced**: The crisis may involve a "smoldering" issue rather than a "sudden issue."[53] An organization may finally address a problem and make much-needed changes.
- **People can be changed**: There's a dual meaning here. First, people can learn from and improve at what they do. Second, if they can't—or won't—they can be changed for someone who is a better fit.
- **New strategies and early warning systems develop**: After going through a crisis, everyone emerges with a better sense of how to better navigate the situation and when to intervene.
- **New competitive edges appear**: The organizational changes prompted by the crisis can result in a competitive advantage, compared to other organizations that have not been tested or forced to change.[54]

Summary: Putting it All Together

A crisis is an extreme event for an organization, but it's also "part of the natural organizational process, purging elements of the system that are outdated and inappropriate, and creating new, unexpected opportunities for growth and change."[55]

Harold Burson, who counseled the Johnson & Johnson executives throughout the Tylenol crisis, was named by *PR Week* as the most influential PR person of the 20th century. Burson's quote in the epigraph of this chapter—about being the conscience of a client, and doing what is in the public interest—was more than cheap talk. He would always advise leaders to "get the bad news out quickly and fully," and refused to take on clients who weren't candid.[56],[57]

A crisis poses threats to an organization's values, finances, resources, and relationships. It can pose an ethical dilemma with the added pressure of public attention and a time crunch. The way in which that crisis is handled has lasting effects, so take a moment to map out the strategy. Remember, "it is possible to fail in many ways, but succeed only in one way,"[58] so "be quick, but don't hurry."[59]

A crisis can also be an opportunity. For that, we'll give Burson the last word: "I have long believed that people have certain opportunities that come to them in their lives, and if they recognize them and handle them properly, it could be a defining moment—a moment in your life that changes your life forever, and usually for the better."[60]

Media Attributions

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Notes

1. McFadden, R.D. (Jan. 10, 2020). "Harold Burson, a giant in public relations, dies at 98," The New York Times. Retrieved from: https://archive.is/jfxML#selection-875.0-875.15
2. The original quote from Mike Tyson in 1987 was "Everybody has plans until they get hit for the first time," and this is one variant that frequently pops up, attributed to Tyson. To wander farther down this rabbit-hole, check out: https://quoteinvestigator.com/2021/08/25/plans-hit/
3. "The Tylenol Murders, Part I" (May 28, 2019). Stuff You Should Know. Retrieved from: https://omny.fm/shows/stuff-you-should-know-1/the-tylenol-murders-part-i
4. Savini, D. (Sept. 2, 2022). Chicago Tylenol Murders: 3 members of Janus family died in 1982, and pain has passed on to generations," CBS News. Retrieved from: https://www.cbsnews.com/chicago/news/1982-tylenol-poisoning-murders-janus-family/
5. Gutowski, C. and St. Clair, S. (March 11, 2024). "The Tylenol murders: The story of a 40-year-old unsolved case begins with a terrifying medical mystery," Chicago Tribune. Retrieved from: https://archive.is/u2sZa
6. Knight, J. (Oct. 11, 1982). "Tylenol's maker shows how to respond to crisis," Washington Post. Retrieved from: https://web.archive.org/web/20160822105938/https://www.washingtonpost.com/archive/business/1982/10/11/tylenols-maker-shows-how-to-respond-to-crisis/bc8df898-3fcf-443f-bc2f-e6fbd639a5a3/
7. Pace, E. (Nov. 12, 1982). "Tylenol will reappear in triple-seal package," The New York Times. Retrieved from: https://archive.is/pAETf
8. Worth approximately $325 million in 2024.
9. Pace (1982), Ibid.
10. "Harold Burson – Full Interview," (2014). The Arthur W. Page Center. Retrieved from: https://www.bellisario.psu.edu/page-center/oral-histories/harold-burson
11. Benson, J.A. (1988). "Crisis revisited: An analysis of strategies used by Tylenol in the second tampering episode." Central States Speech Journal, 39: 49-66.
12. Kleinfield, N.R. (Sept. 17, 1983). "Tylenol's rapid comeback," The New York Times. Retrieved from: https://web.archive.org/web/20161016134741/http://www.nytimes.com/1983/09/17/business/tylenol-s-rapid-comeback.html
13. Kleinfield (1983), Ibid.
14. At the time of the murders, James W. Lewis wrote to J&J, demanding $1 million to put an end to the murders. He admitted writing the letters, but denied responsibility for the actual poisoning and was sentenced to 10 years in prison. Decades later, DNA evidence cleared Lewis as well as other prime suspects.
15. Some historians also point to Ivy Lee's transparency during the Pennsylvania Railroad disaster, but there seems to be general agreement regarding J&J's response as the most famous "modern" example of a crisis response.
16. This definition is a combination of a few different definitions, primarily relying on: Seeger, M. W., & Ulmer, R. R. (2003). Explaining Enron: Communication and responsible leadership. Management Communication Quarterly, 17(1), 58-84. See also Thomsen, S.R. (2023). "Not the company we thought it was": Southwest Airlines' attempt at image repair during its October 2021 flight cancellation crisis. Public Relations Review, 49: 10239.
17. Heath, R.L., & O'Hair, H.D. (2009). The significance of crisis in risk communication. In R. L. Heath & H. D. O'Hair (Eds.), Handbook of risk and crisis communication (pp. 5-31). New York: Taylor and Francis Group.
18. Seeger, M., & Sellnow, T. L. (2016). Narratives of crisis: Telling stories of ruin and renewal. Stanford University Press. (Page 10).
19. Meyers, G.C., & Holusha, J. (1986). When it hits the fan: Managing the nine crises of business. Boston: Houghton

Mifflin.

20. Quarantelli, E.I. (1988). "Disaster crisis management: A summary of research findings," Journal of Management Studies, 25: 273-285.
21. This isn't a novel observation: Coombs' SCCT model was directly influenced by extant theories on interpersonal relationships. See: Coombs, W. T. (2020). Situational crisis communication theory: Influences, provenance, evolution, and prospects. Crisis communication, 121-140.
22. Ryan, H.R. (1982). Kategoria and apologia: on their rhetorical criticism as a speech set, Quarterly Journal of Speech, 68(3): 254-261.
23. Pomerantz, A. (1978). Attributions of Responsibility: Blamings. Sociology, 12(1), 115-121. https://doi.org/10.1177/003803857801200107
24. Coombs, W.T., & Holladay, S.J. (1996). Communication and attributions in a crisis: An experimental study in crisis communication. Journal of Public Relations Research, 8(4): 279-295.
25. Kim, S. (2022). It is time that matters in crisis communication: The role of temporal distance and crisis threat appraisal. Public Relations Review, 48: 102155.
26. As a reminder, an Outward Mindset is a three-step process whereby a person (a) sees the goals, needs, and challenges of others; (b) adjusts their efforts to be more helpful to others; (c) measures and holds themselves accountable for their impact on others. For more, see Chapter 4.
27. In fairness to Coombs, SCCT acknowledges the importance of an organization's history and relationships with key publics prior to a crisis.
28. Wilcox, D. (2006). Public Relations: Strategies and Tactics. Boston: Pearson.
29. The term "state" or "phase" is preferable to "stages," which suggests a neat linear progression, rather than potentially regression to a previous state, or even an instance where there is not a state of recovery.
30. Brunner, B.R. & Hickerson, C.A. (2019). Cases in Public Relations: Translating Ethics into Action, Oxford University Press: New York.
31. Benoit, W. L. (1997). Image repair discourse and crisis communication. Public relations review, 23(2), 177-186.
32. Benoit later adds in "whataboutism" as well as a "straw" person denial. "Whataboutism" is a deflection strategy that attempts to change the topic. The straw person denial is a rhetorical fallacy in which the accuser/accusation is deliberately mischaracterized. Both of these defenses are used—notably in politics—but are not included here, as they do not constitute an effective and ethically sound response.
33. Benoit includes Compensation under Reducing Offensiveness, rather than as a Corrective Action. The rationale is that Compensation is a gift intended to "counterbalance" rather than "correct" the injury, while corrective action would actually address the cause of that injury and prevent its recurrence. This focuses on the possible effects and effectiveness of action rather than the action itself. I would argue it's a better fit under Corrective Action. For example, if an organization engaged in Mortification and also compensated victims, they are not reducing the offensiveness of the act itself—they are, after all, taking full responsibility and acknowledging the offensiveness of that act. Compensation would be a gesture best interpreted as part of a corrective action, not something to rhetorically reduce the offensiveness of the act.
34. Benoit presents this as a single category. Waymer & Hill (2023) contend that Image Repair Theory is not overtly racist, but—like many theories—has "whiteness" as a default. Those authors argue that race and other factors alter the perception an audience has regarding an act or action, and also rhetorically limits potential responses by the accused. They use the example of Kamala Harris being the focus of negative attacks by Donald Trump ("nasty," "mad," and "angry"), and note that she "attacks the accuser" indirectly, not mentioning him by name—and does so to avoid being perceived as angry, which is a consideration that may be an afterthought for a "default" white male politician. For more, see: Waymer, D. & Hill, T.E. (2023). "A conceptual update to image restoration theory (IRT) via an analysis of the vice-presidential campaign of Kamala Harris," Public Relations Review, 49: 102306.
35. Waymer & Hill (2023), Ibid.

36. "How to apologize and say, 'I'm sorry.'" (n.d.) Perfect Apology. Retrieved from: https://www.perfectapology.com/how-to-apologize.html
37. Stein, K.A. & M.H. Barton (2018). "'I'm sorry you interpreted my behavior the way you did': Toward a new understanding of the nuances of mortification, Western Journal of Communication, 83(2): 252-264.
38. Benoit, W. L. (2024). Accounts, excuses, and apologies: Image repair theory extended. State University of New York Press. Emphasis added.
39. This is referred to as "strategic silence," and "strategic inaction" in Smith, R.D. (2017). Strategic Planning for Public Relations, 5th ed., Routledge: New York. Pages 188-190.
40. Another common example of this is a defendant at a trial not speaking to reporters on their way in or out of the courtroom. Clearly, they have image repair work to do, and inaction—or not communicating—in that moment of crisis is an active, strategic choice.
41. Bernays, E.L. (1923). Crystallizing Public Opinion. Ig Publishing: New York. Pages 51-52.
42. Bernays was fond of deploying indirect action in a range of situations, but this instance is one of the few that is ethically unproblematic.
43. Aguilar, F.J. (1967). Scanning the business environment. New York: Macmillan.
44. Issues management is proactive, while crisis communication is reactive.
45. This phrase is a cheap knock-off of a much better example from Page & Parnell: "Issues management…[is] an early warning system designed to see bad things coming. It's like forecasting the weather and preparing for it instead of trying to cope when the storm comes." See Page, J.T. & Parnell, L.J. (2021). Introduction to Strategic Public Relations: Digital, Global, and Socially Responsible Communication, 2nd ed., SAGE. Page 277.
46. The list here is a combination of overlapping recommendations from multiple sources, including: Falkheimer, J. & Heide, M. (2018). Strategic Communication: An Introduction. Routledge: New York.
47. Smith (2017), Ibid.
48. Freberg, K. (2019). Social Media for Strategic Communication: Creative Strategies and Research-Based Applications, SAGE: Thousand Oaks, CA.
49. Luttrell, R. (2019). Social Media: How to Engage, Share, and Connect, 3rd ed., Rowman & Littlefield: Lanham, MD.
50. Nagle, D. (2019). "Crisis management in public relations," pp. 95-104 in K.S. Kurtin (ed.), Public Relations in Practice. Oxford University Press: New York.
51. Smith (2017), Ibid., p. 166.
52. List of questions adapted from slides created by David Guth (2011).
53. Smith (2017) Ibid., distinguishes between a "sudden" crisis and a "smoldering" crisis. The former is a "disruption of business that occurs without warning, with the likelihood of generating negative news coverage," and the latter is a "business problem not generally recognized that may generate negative news coverage if and when it goes public." (Page 463).
54. Meyers & Holusha (1986), Ibid.
55. Seeger, M. W., Sellnow, T. L., & Ulmer, R. R. (1998). Communication, organization, and crisis. Annals of the International Communication Association, 21(1), 231-276. Page 233.
56. McFadden (2020), Ibid.
57. This should not be viewed as a hagiography of Burson. His agency was paid to represent repressive governments around the globe. Notably, just two years after the Tylenol murders, Burson represented Union Carbide during the Bhopal disaster that killed thousands of people in India. Scholars have argued that communication failures played a role in the crisis: See Shrivastava, P. (1987). Bhopal: Anatomy of a crisis. Cambridge, MA: Ballinger.
58. This is a callback to the quote from Aristotle in Chapter 3: Aristotle, from Nicomachean Ethics (1998). Trans. W.D. Ross, pp. 28-47. Reprinted as Chapter 14 In The Ethical Life: Fundamental Readings in Ethics and Moral Problems,

R. Shafer-Landau (ed.), 2nd ed., Oxford University Press: New York. Page 144.

59. Quote attributed to former UCLA basketball coach, John Wooden. See: Hill, A. & Wooden, J. (2001). Be quick—but don't hurry: Finding success in the teachings of a lifetime. Simon & Schuster.
60. Schaefer, M. (Feb. 26, 2012). "Wisdom from the most influential PR Professional of the century," Businessesgrow.com, Retrieved from: https://businessesgrow.com/2012/02/26/wisdom-from-the-most-influential-pr-professional-of-the-century/

15.

VISUAL COMMUNICATION

Nathan J. Rodriguez, Ph.D.

First, a Story...

Imagine it's the 1920s, and you're a store clerk who sells watches.

Actually, scratch that. Before we get too far in this anecdote, do a quick Google Images search for "watches" and see if you notice any similarities in the search results.

Of course, there are plenty of visual considerations with watches that give them a certain look and feel—the materials used, the color, the way the numbers are rendered all go into the overall aesthetic. But there's something else: Look at the time.

Chances are, it's set to within a minute or two of 10:09. And, chances are that the second hand is set to within a few seconds of :35. Timex shows 10:09:36, while Rolex will always use 10:10:31. Seiko used 10:10:30 before 1964 and has used 10:08:42 since then.[1] Apple—in an effort to be "slightly ahead" of its time—opted for 10:09:30.[2]

An early advertisement from the Hamilton Watch Company.

Before we get into why watch manufacturers choose to display that time, let's go back to the origin story for a minute. As the story goes, the store clerk at the Hamilton Watch Company noticed that when he set the watches to somewhere around 10 after 10, they sold better. So Hamilton set all of its watches for that time, and other watch-makers followed suit. That advertising practice is now a century old, and an example of purposive design that often goes unnoticed.

To my knowledge, there has never been an actual study regarding the psychology of 10:09. (*If you come across any formal studies, let me know!*) A common explanation is that the watchmaker's logo is typically below the 12, and having the hour- and minute-hands at 10 and 2 provides a prominent visual frame for the logo. That positioning also conveys a sense of movement and balance, and some have even posited that the hour- and minute-hands create a smiley-face in this position.[3] Another idea is that the cardinal orientation of straight lines and sharp angles are easier for our eyes to process than curves, a tendency that's "built into the biology of our eyes."[4]

The Takeaway

Professionals sweat the most minute details, while amateurs overlook them.

Approach visual communication intentionally, and you're more likely to succeed. There should be a purpose behind including and placing all imagery and text. If your first impression is good, and you can explain the rationale behind the visual choices, you're in great shape.

Phrasing and framing go a long way toward selling your idea to an audience, but effective visual communication lets the audience feel the same "aha" moment of discovery as you did. When the phrasing, framing, and visual communication of an idea align for a particular public, you've effectively grabbed their attention.

Introduction

Visual communication is a vast field, and entire courses, majors, and careers are devoted to its practice. This chapter is therefore just a glimpse at a much broader and more detailed topic.

The point isn't to transform you into a graphic designer, but rather to ensure a basic understanding of how color, typeface, and visuals influence perceptions of products, services, and organizations.

Even if you might not consider yourself a graphic designer, organizations continue to expect new hires to be able to do a bit of everything. If you understand a handful of general concepts regarding design, you'll be better able to express what you like or don't like about a visual concept, using terminology that enhances the credibility of your argument.

What We'll Cover:

Why it Matters

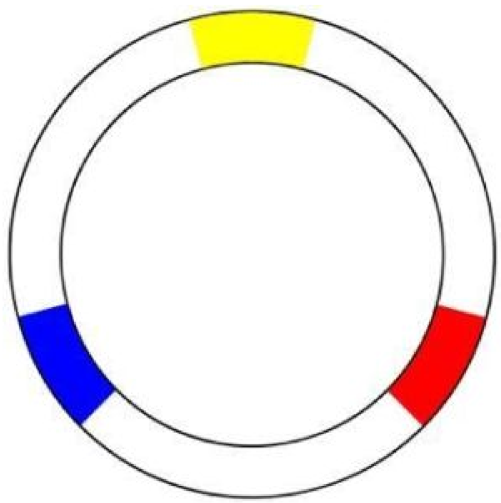
Sight is the most important sense that consumers use when evaluating brands and their purchasing options. Our visual cortex processes visuals 60,000 times faster than words, and the credibility of a brand or organization is often judged by whether we find their visual identity attractive.[5]

Visual design covers everything from the product's packaging to the appearance of the office or storefront—even the employees who interact with the public[6]—to the logo, website, fonts, images, symbols, colors and overall layout of marketing materials.[7] Publics tend to align with brands and organizations that provide a better experience at every visual touch point.

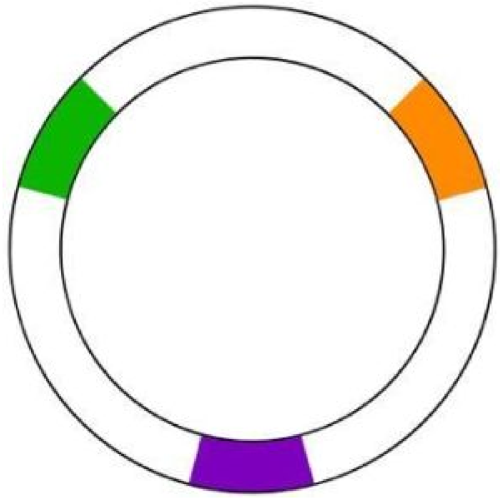
The first step on our visual communication, or VisComm, journey is **Color Theory**, which is essential to understanding what a particular color can convey to a particular audience, and also how different colors interact with one another.

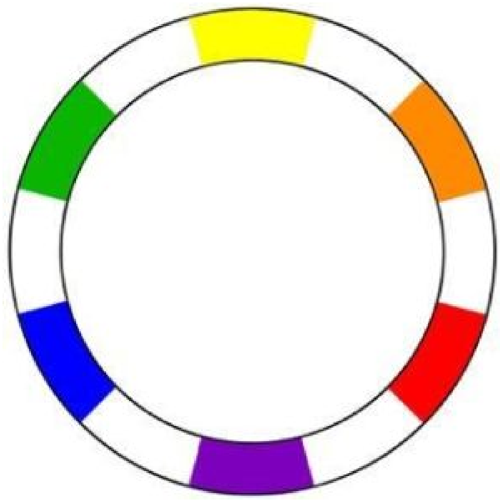
Color Wheel

Ask any local kindergartener, and you'll learn the primary colors are yellow, red, and blue. They are the colors we can't make

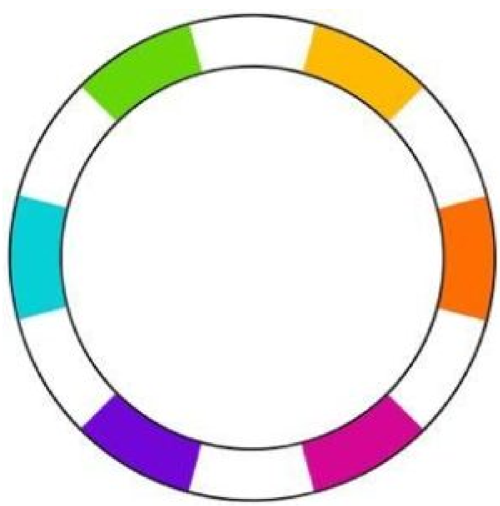


Secondary colors are a mix of those primary colors. So yellow and red make orange; red and blue make purple; and blue and yellow give us green.

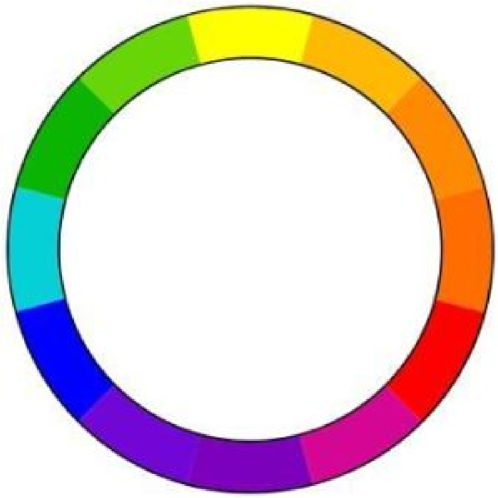




We're halfway there. The remaining empty spots on our wheel are the colors produced by mixing a primary and a secondary color, known as a tertiary color.



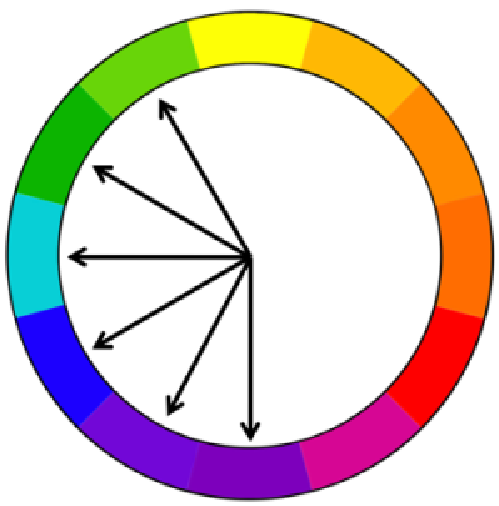
Tertiary colors are yellow-orange, red-orange, red-purple, purple-blue, blue-green, and green-yellow. Those colors are usually referred to by more specific names like chartreuse, cyan, and indigo.



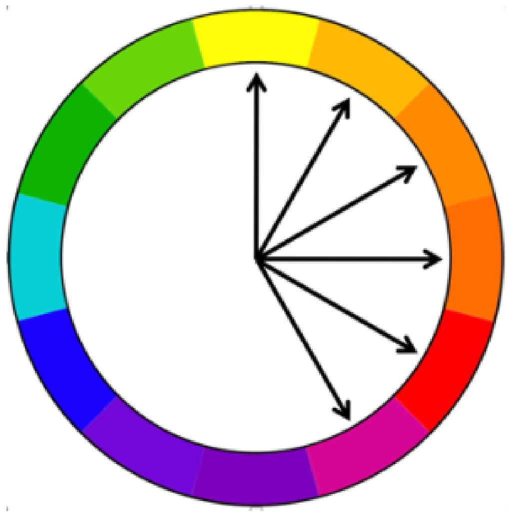
So, here's our full color wheel with the 12 basic colors: Three primary, three secondary, and six tertiary.

The color wheel is useful for understanding colors and selecting combinations that work well together. Designers refer to the purposive selection of colors as a color palette.

Colors are also grouped into temperatures: warm and cool.



Cool colors



Warm colors

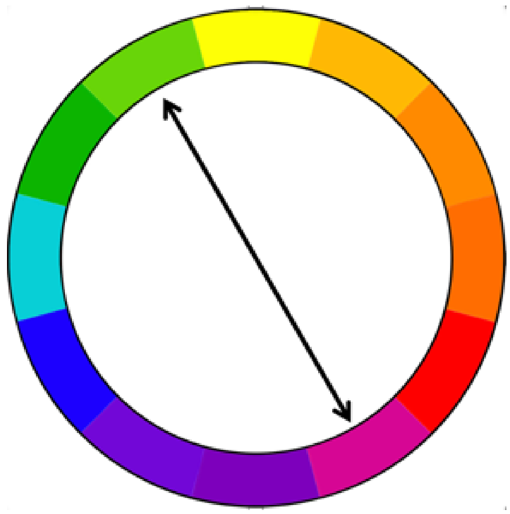
Blue is the only primary color in the cool spectrum, which means other colors are created by combining blue with a warm color (yellow for green and red for purple). Greens therefore take on some of the attributes of yellow, while purple takes on some of the attributes of red. And while green and purple are technically cool colors, there are warmer and cooler greens and purples.

Cool colors are calming, relaxing, and reserved. They remind us of night, water, and nature. Use cool colors in your designs to convey a sense of calm or professionalism.

Because of the way our eyes process colors, cool colors will naturally recede into the background. They work best as a larger background color.

Warm colors will naturally come forward for the same reason. They work best in text or as an accent color. Warm colors are all truly warm, since both red and yellow are primary colors, and orange falls in the middle. The colors remind us of fall, fire, sunrises and sunsets, and convey friendliness, happiness, and coziness. And if those colors happen to remind you of fast-food restaurants, that's because red and yellow combinations are perceived as eye-catching, exciting, and connoting speediness. Use warm colors in your designs to convey a sense of enthusiasm, energy, and passion.

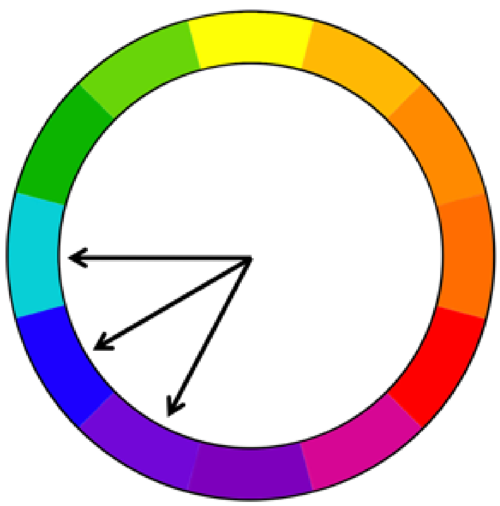
One way to select a color combination is by using complementary colors.



Complementary colors are on opposite ends of the color wheel, which means they'll have the highest contrast. This is yellow-green (chartreuse) and red-purple (magenta).

You'll typically want to use one color as the majority color and accent with its complement. A little goes a long way, so use the complement sparingly to draw attention to something important. If you aren't careful, the design can become overwhelming and difficult to look at, since the eye won't know where to focus.

Another way to select a color palette is by picking analogous colors.



Analogous colors are the colors next to one another on the color wheel. Analogous colors create a harmonious palette because they all share a single color. Here, blue-green, blue, and blue-purple all share a blue base.

Because everything blends together nicely, analogous colors lend a calmer design. The challenge is to find a way to make the most important information stand out since the color contrast is lower than it is for complementary colors.

The Psychology of Color

Color has different meanings in different situations. One unresolved question is whether human reactions to colors are instinctual or if those reactions stem from learning by association.[8]

Natalie Kalmus was the color director for Technicolor Motion Pictures, and a true legend in the movie industry—seriously, check out her IMDB page. In the 1930s, she produced a color chart, as well as Color Consciousness, in which she discusses how the "psychology of color…can subtly convey dramatic moods and impressions to the audience."[9] While she originally produced this work for Hollywood, many of her observations continue to influence designers in all walks of life nearly a century later.

Colors can convey different ideas across cultures and nations, and can have different meanings based on demographic factors.[10] At the same time, the following list of colors and descriptors is widely accepted as a "default" interpretation for audiences in the United States.

Red is associated with passion, danger, love, and anger. It's linked with fire and violence, increasing blood pressure and heart rates, and creating a sense of urgency. It can be a powerful accent color, but can become overwhelming if it's used too much in design. Red can be very versatile, with brighter reds being more energetic and darker shades being more powerful and elegant. You'll see this color in automobile and food advertising as well as clearance sales.

Orange is a vibrant and energetic color that conveys energy, happiness, and vitality. Muted orange colors can remind us of the earth, fall, and changing seasons. It can represent change and movement in general. Orange can be playful, but also a bit aggressive and can help create a call to action. It commands our attention in design without being as overpowering as red, and is often seen as more friendly and inviting.

Yellow is the first color our eyes process. It's the brightest and most energizing of the warm colors, and is associated with happiness and sunshine. It's optimistic and youthful. It can also be associated with caution, cowardice, and deceit. In design, bright yellows lend a sense of cheerfulness. Softer yellows are commonly used as a gender-neutral color for babies and young children. Lighter yellows lend a calmer feeling of happiness than bright yellows. Dark yellows and gold-hued yellows can look antique and be used in designs where a sense of permanence is desired.

Green is the easiest color for the eyes to process. It can represent new beginnings and growth, as well as nature and abundance. It can also be associated with envy or lack of experience. It has the same calming attributes as blue, but also incorporates some of the energy of yellow. Stores use it to help customers relax. In design, it can have a balancing and harmonizing effect. It's appropriate for designs related to wealth, stability, renewal, and nature. Brighter greens are energizing and vibrant, olive greens are representative of the natural world, and dark greens are the most stable and representative of affluence.

Blue connotes a sense of calm and responsibility, but can also signify sadness. It's often associated with loyalty, trust, and sincerity, and is frequently used by banks and businesses. In design, the exact shade of blue will have a tremendous impact on how it is perceived. Lighter blues are refreshing and friendly, while darker blues are strong and reliable. The color blue is associated with peace and often has religious and spiritual connotations. Dark blues are excellent for corporate sites or designs where strength and reliability are important.

Purple is associated with royalty, because historically it was the most labor-intensive color to produce, as it was originally made with snails. Legend has it that Hercules's dog discovered the pigment—*a story too good to fact-check*! Today, purple is also associated with creativity and imagination. It soothes and calms, and is often seen in beauty or anti-aging products. Dark purple lends a sense of wealth and luxury, while lighter purples are softer and can be associated with spring and romance.

Black is the strongest of the neutral colors. Neutral colors often serve as the backdrop in design and are commonly combined with brighter accent colors. The meanings and impressions of neutral colors are more affected by the colors surrounding them than warm and cool colors. Black is used in edgy or elegant designs and can be conservative, modern, traditional, or unconventional. It can convey mystery, sophistication—or evil—and is often used to market luxury products.

White is a neutral color that works well with almost any other color. It's associated with purity, cleanliness, and virtue. It's popular in weddings and the health care industry. In design, it's considered a neutral backdrop that allows other colors to have a larger voice. It can help convey simplicity and is popular in minimalist designs. It's also the best background for reading black text.

Components of Visual Communication

The more you get into design, the more ideas you come across—ranging from line, shape, value, color, texture and type to alignment, contrast, balance, proximity, repetition, unity, form and format—just to name a few. There's a free video, "The Fundamental Elements of Design," that provides a brand-centric overview of basic design terminology in less than 3 minutes.

Robin Williams, author of the classic *Non-Designer's Design Book*, contends four principles of design influence every design project: proximity, alignment, repetition and contrast. Understanding these concepts and knowing how to adjust them can transform an "okay" design into something visually stunning.

Proximity means that items that are related to one another should be grouped together closely. This helps the viewer process the information by providing structure and reducing visual clutter. It's important to note that the concept does not mean that everything should be bunched up, but certain elements should be both logically connected and visually connected. The Nielsen Norman Group published a nice overview of Proximity with several examples.

Alignment means that every element should be placed with precision. Every element should have a visual connection with other elements. There is a natural tendency to center elements, which works in some cases, but also may be too boring. Meanwhile, a strong left or right alignment, paired with proximity, could substantially improve the feel of the design. For more on Alignment, here's an overview with examples.

Repetition means repeating different design elements throughout by font, shape, color, line thickness, and concept, to name a few. Repetition unifies the design and creates a sense of cohesion. Look at a website, a pamphlet, or even this text, and you'll see visual elements repeated. The Interaction Design Foundation put together a nice primer on Repetition, and the related concepts of pattern and rhythm.

Contrast is perhaps the most important concept, as it draws the viewer into the design. The idea is that if elements do not belong together, you should make them different. Contrast can help direct the viewer to a particular place, and it should help organize information as well. As discussed in this overview, you can create Contrast through color, size, shape, and typography.

The band Eggy uses a logo that creatively reinforces their brand. Image used with written permission of the band's management.

Typography

When we're so focused on the message itself, it can be easy to forget about the visual experience that accompanies the message.

Typography is the art and science behind arranging type to appeal to an audience. The type itself should be seen as "an art form of shapes, curves, circles, and lines" that connect with the brand personality and the target audience.[11] In short, it is "word art."[12]

Typeface and **Font** are terms often used interchangeably in informal conversation, but they are different: A typeface, such as Times New Roman or Helvetica, is a collection of related fonts, like bold and italics.

The most basic classification for type styles is Serif and Sans Serif. Serif styles feature decorative "feet" or "tails" on individual letters.[13] Sans is the French word for "without," and sans serif styles feature straight lines without feet or tails on individual letters.

Common serif fonts include Times New Roman, Baskerville, and—my personal favorite—Georgia. Serif fonts harken back to a pre-industrial time when calligraphy was more common. For that reason, it's viewed as traditional, authoritative, and reputable. It can also convey a sense of delicate refinement. For practical purposes, serif fonts are often used for a larger body of text as it's believed to be easier for the viewer to visually process, due to the more pronounced differences between individual letters. The serifs also lead the eye more easily from one letter to the next, which enhances the flow for the reader.

Common sans serif fonts include Arial, Calibri, and—perhaps the only typeface to have its own documentary—Helvetica. Sans serif fonts represented such a break from the norm that they were referred to as "grotesque" when they first appeared in the 1920s, and that nickname has persisted. In the mid-20th century, new sans serif typefaces like Helvetica were called "neo-Grotesque," but quickly became popular as they were seen as a cutting-edge alternative, offering a clean, neutral, and approachable look. For practical purposes, sans serif type styles are often used when space for text is limited. Common applications are billboards and visual presentations, as well as apps and websites that someone typically interacts with on a smaller, lower-resolution screen.

For our purposes, it's not essential to memorize every term used by designers, but the most common descriptors for individual letters include the **baseline**, **median**, **X-height**, **ascender**, and **descender.**

Image courtesy of Max Naylor, Public Domain

The baseline is the bottom line on which most letters are placed. The median is the ceiling for most lower-case letters, and the space between the baseline and median is referred to as the x-height because it's equal to the height of a lowercase "x." The greater the x-height, the more legible it becomes. Ascender refers to parts that rise above the median, and descender refers to parts that fall below the Baseline.[14]

Weight refers to how thin or thick individual characters are, and **kerning** refers to the space between letters. Kerning can wind up being important: Take a 2-minute break and search for "bad kerning examples."

Readability and **legibility** are also often used synonymously in informal conversation, but they are different. Readability refers to the ease of reading the entire text, while legibility is a "zoomed in" version of that concept, used to describe how easy or difficult it is to distinguish individual characters from one another.

To the untrained eye, the readability and legibility of some graffiti may leave a bit to be desired, but it's one of the most creative examples of typography and use of color. Image from Creative Commons.

Experts Talk Back:

Three Questions with Dr. Ren-Whei Harn, graphic designer in the greater Kansas City area.

Q: You've rebranded and crafted visual identities for a lot of different clients. And I'm sure that each situation is a little different—if not a lot different—but can you describe the process of working with those clients to come up with the rebranding? How much of it is their vision? How much is your vision? How much is a shared vision, and what's that give-and-take like?

My recent clients in the last five years have been pharmaceutical companies, and that's a whole different beast. But in a broad sense, on a more typical design project—it could be for a book or for a tattoo or for a brand: We'll have a kick-off where they share their ideas; what they're wanting to do with it, their usual target audience, primary audience, secondary audience, and the look and feel that they're thinking of.

And then from there what we usually do is assemble mood boards with at least three very solid concepts—three different visual directions, and then present that to the client and see what they respond to. Because this is the point where, there's three different paths here: Which path do we take? Or do we need to combine some things and then come up with Option 4?

So then from there, you start distilling from these mood boards colors, typography, the font, and things like that.

Q: You mentioned in the last few years that you've done a lot of work with pharmaceutical companies. From the outside looking in, it seems like that may be a space that's less about whimsy and cutting-edge creativity and instead places value on the design and images that reinforce ideas like reliability and safety or credibility and things like that. First, I don't know if that's a fair characterization. Is it helpful to have those parameters or does that make your job more challenging?

It's always good to have a framework to help guide your work.

I really don't like it when clients are like, "Well, I'm open to anything."

I'm like, "Well, no you aren't. You will not be." (Laughs).

So, in working with pharmaceutical companies, we do have our framework. There are ways to be creative. We try to push in different ways because the market is so crowded for certain drugs that you really want to differentiate. So, you don't want to be too clinical.

There's two different ways with pharmaceuticals, and it depends on the audience. So, if you're marketing it to consumers, you need to know "Am I marketing this to 20-year-olds or am I marketing this to 40-year-olds?" because that's going to have a very different look and feel.

Whereas our other side is you're marketing to health care professionals, and usually that isn't very sexy because health care professionals just want to see the information they want to see, because they've seen so much of this. So, look and feel and trying to make it exciting isn't a priority with them; It's actually just visual hierarchy of information—trying to discern what information they're going to look for, highlighting the keywords they're going to look for, and just making sure that if they're going to a site that they'll find something really quick and then move on with their day.

Q: What advice would you have for students who will graduate in the next few years and enter the field of public relations and strategic communication, maybe with a design emphasis?

They won't be designers. The important thing is for them to know how to communicate with designers.

If something's not working, to be able to communicate instead of just "Well, I don't like it." Well, what's not working? Is it the low contrast? Is it the framing? Is it the crop of the image? Is it the scale? Is it the visual hierarchy?

Because being able to identify visual hierarchy is a huge thing: What does your eye see first? Being able to be really in tune with what your eye sees first, and being able to describe that.

Q: Piggybacking off that, I understand there are concepts such as proximity, alignment, repetition, and contrast—what other terminology or concepts do you think are most important for students to be able to communicate what they're thinking or feeling about something to a designer?

Those general principles are good.

I'm trying to think about our clients' push back. It oftentimes probably boils down to the visual hierarchy: Just prominence of things—whether the headline and the image are competing.

If you want a more splashy image, you're going to detract from the headline. You can't have both. Every person sees things in a process. There's going to be 1, 2, 3, 4.

And then there's some bad designers out there that don't really abide by it, and that's where you really see design fall apart. But if you pay attention to visual hierarchy, then everything else falls in line. So, if you're saying, "Well, in these two sets of copy, my eyes are bouncing between them." Do we need to pull them apart? Do we need to make one bigger, or do we need to set one on a darker background to make it pop more?

So, if you can figure out that process of vision and reading, everything else will work itself out. That's my theory. (Laughs).

Best Practices for Photos/Instagram Ideas

For new products, it's best to go with a picture of the product or someone using it.

To call attention to company culture and employees, humanize the brand. Give the viewer a "backstage pass" and provide images of behind-the-scenes activities. People want to see who works there and who is actually on social media. Don't use traditional headshots, make it fun and relaxed—not someone sitting at a desk.

For trending topics and events, you need to stay up-to-date about what matters to your followers. Post pictures of the news, fun facts, and trending events and topics.

Finally, photo contests are a fun way to engage users. People submit their own images in exchange for recognition from a brand they like: It's a win-win.[15]

Best Practices for Videos

Some of the more basic ideas for videos include unboxing a product, demonstrating a product, producing how-to or educational videos, and interviewing people.

For these videos, show—don't sell.

A quality video is crafted with purpose. You need to know your audience and the platform on which you'll reach them. (Again, it all comes down to understanding purpose, audience and method.) Sketching out ideas on a storyboard is a good first step.

Pay attention to the style and tone, including the tone of the message, the dialogue, production quality, video quality, and audio quality.

Does the script do enough, or is it trying to do too much? Either of those will bore the audience.

Consider the lighting, the angles and shots you want, and how those will be edited. Finally, how will you share and spread this particular video?[16]

This is just a brief checklist of some of the considerations that go into producing a successful video.

One example of great use of visual design was a classic Public Service Announcement by Metro Trains in Melbourne that encouraged people to be safe around trains—perhaps you're one of the nearly 300 million views it's accumulated over the past decade:

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://uen.pressbooks.pub/stratcomm/?p=165#oembed-1

Best Practices for Websites

Aim for a simple design, with clear content that's easy for users to navigate. Home pages that are poorly organized or too content-heavy tend to prevent first-time website users from sticking around.

A simple design means limiting the number of images, the number of words and the amount of information. Unnecessary words and graphics are confusing. Negative space allows a reader to view the entire page, and pay closer attention to what's there.

All imagery should be proportioned and complement the other elements.

For clear writing, focus on sentence length, and prioritize word choice and brevity. Paragraphs should be short, no more than a few sentences. The writing should be concise and precise, similar to a magazine ad.

The user experience of the website should be as frictionless as possible. This means considering the overall site navigation, as the user should be able to find what they need quickly and easily. The menu tabs need to be arranged in a purposive way that's helpful and logical. The idea is to make the process feel effortless.[17]

Summary: Putting it All Together

Examples of great visual communication are all around us, as are examples of ineffective visual communication. You may notice that some brands have strategically built a visual identity around a deep metaphor, as was discussed in Chapter 7.

The hope, after finishing this chapter, is that you're better able to identify and articulate potential issues in the way a client presents themselves to their publics, and are also able to evaluate your own creative contributions with a more critical eye.

Sometimes it's not what you say, but how you say it. And it's not the image, but how you convey it.

Whether you're crafting an advertisement, a post on social media, a video, a website—or any other form of communication—the elements of color theory, and the design principles of proximity, alignment, repetition, contrast, and typography can make or break the effectiveness of that messaging.

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- Complementary colors
- Analogous colors
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Notes

1. https://museum.seiko.co.jp/en/knowledge/trivia01/
2. Seward, Zachary M., Quartz, 9/10/14. https://qz.com/262524/late-to-watches-apple-watch-set-a-minute-early
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5. Luttrell, p. 127, 129
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7. Miller, pp. 67-68
8. Popa, Popescu, Berehouiu & Berehoiu, 2013.
9. Kalmus, 1935, p. 142.
10. Popa et al, 2013
11. Blakeman, 2018, p. 83.
12. Dylan Todd, quoted in Adobe.com/creativecloud/design/discover/serif-vs-sans-serif.html Accessed 6/21/22
13. Rather than “feet” and “tails,” you may think of them as “hats” and “shoes.” Thanks to Dr. Nicola Corbin for this delightful observation.
14. Ed Wasserman, 6/9/16. https://webdesign.tutsplus.com/articles/a-comprehensive-guide-to-typography-basics--cms-26644
15. These ideas are from Luttrell, pp. 131-2, lightly paraphrased here.
16. These suggestions primarily come from Luttrell, pp. 133-136.
17. These suggestions all come from Juska, pp. 33-4.

16.

THE FUTURE OF PR & STRATEGIC COMMUNICATION

Nathan J. Rodriguez, Ph.D.

"I wish that the advice I impart...could guarantee you a career free of failures or mistakes, but I can't. Failure is part of our existence, and in PR especially, the situations leading up to it can be out of your control."
—Ed Zitron[1]

"Every single thing we do on this planet, and in our jobs, and in our daily life is either—if you get really intense about it—is either helping save the world or maybe contributing to its death. And it could be 51% and 49%: It could be just the tiniest thing. Everybody is responsible, and brands more than anybody because a lot of times, they're contributing to the unhealthy cycles of consumerism that contribute to the death of the planet."
—Doug Pray[2]

First, a Story...

The year is 2050.

In the bustling metropolis of New York City, Emily, a seasoned Public Relations professional, begins her day with a sense of anticipation mingled with familiarity. As she sips her morning coffee, she reflects on how the landscape of PR has evolved since the early 21st century.

Emily's day kicks off with a flurry of emails and messages flooding her inbox. Amidst the digital cacophony, she discerns urgent client requests, inquiries from journalists, and updates from her analytics dashboard, fueled by advanced AI algorithms. These tools provide valuable insights, streamlining data analysis and predictive modeling to inform strategic decision-making.

After triaging her inbox, Emily dives into a strategy session with her team. Together, they brainstorm innovative ways to leverage emerging communication channels and adapt to shifting societal trends. While

AI-powered analytics offer invaluable support, Emily emphasizes the human element of PR—nurturing relationships, fostering trust, and crafting authentic narratives that resonate with diverse audiences.

As the day unfolds, Emily finds herself juggling multiple projects, from crisis management for a Fortune 500 company to spearheading a grassroots advocacy campaign for a nonprofit organization. While AI algorithms crunch numbers and predict potential reputational risks, Emily's expertise lies in interpreting the nuances of human behavior, anticipating stakeholder reactions, and orchestrating strategic responses.

Amidst the whirlwind of meetings and deadlines, Emily carves out time for mentorship and professional development. She recognizes the importance of staying abreast of technological advancements and equipping herself and her team with the skills needed to harness the potential of AI and other emerging technologies in PR practice.

As the sun sets over the city skyline, Emily reflects on the evolution of PR over the decades. While technology has undoubtedly transformed the profession, she remains steadfast in her belief that the heart of PR lies in authentic storytelling, genuine engagement, and a commitment to ethical conduct.

The Takeaway

The narrative of Emily's day in 2050 underscores the integral role of technological developments, including AI, in shaping the practice of Public Relations. While these tools offer unprecedented insights and efficiency, success in PR ultimately hinges on a balance of technical proficiency, strategic acumen, and human-centric communication skills. As aspiring PR professionals, it is essential to embrace the opportunities presented by technology while upholding the timeless principles of integrity, empathy, and authenticity in our work.

Introduction to the Future of PR and Strategic Communication & The *Other* Takeaway

In this chapter, every word in the "First, a Story" section, including "The Takeaway" was produced by ChatGPT in just a few seconds. This was done with a minimal set of prompts, using the free, publicly available ChatGPT 3.5 in an effort to document the technology in early 2024.

The response by ChatGPT correctly asserts that changes in technology will result in changes to roles and expectations, as well as the tools used by practitioners—but the foundation of PR and Strategic Communication will endure.

In this final chapter of the text, we'll take a look at the present and possible future of Public Relations and Strategic Communication. To narrow that down a bit, the focus will be on jobs today and the job market of tomorrow.

What We'll Cover:

Application & Areas of Expertise

Throughout the text, applications of PR and Strategic Communication concepts and practices have been mentioned directly and indirectly. There's no definitive list of all the potential jobs available to someone who specializes in PR & StratComm. The next handful of paragraphs offers a glimpse at some of the more common areas in which you are likely to find work.

Photo by fauxels via Pexels.

Event Planning involves elements of PR, Marketing and Advertising—and a whole lot more in terms of organizational and management skills than we're able to cover here. Entire books have been written regarding the fundamentals of event management.[3,4,5] There's no shortage of [tools, tips, and resources] for virtually every conceivable event, so it's worth taking the time to get a good grasp of the basics. [An event planning guidebook] created by Sam Houston State University contends that there are six dimensions to consider: anticipation, arrival, atmosphere, appetite, activity, and amenities.[6] Events should be fun and engaging, and take the time to care about details can be the difference between merely hosting an event, and hosting an event that people remember and tell others about.

Working for a 501(c)(3) **Nonprofit Organization** can be one of the most rewarding positions in PR and StratComm because you have the opportunity to advocate for a cause. It can also be stressful, as practitioners often face a perpetual need for resources while being tasked with many communication roles—usually with lower pay compared to similar positions at for-profit companies. Typical tasks include creating content, recruiting volunteers, engaging the community, building and maintaining the brand, crafting fundraising campaigns, and "development," or building relationships with key donors. Various political and advocacy groups can fall under the "nonprofit" umbrella, and tend to have a more targeted focus and—depending on the group—greater access to financial resources and personnel than a more traditional charitable organization.

Sports and Entertainment is "one of the hardest areas to break into right after college because so many people would love to work for the athletes and celebrities they already enjoy following."[7] It's simply not enough to be a fan, because that status will not separate you from any other applicant. Successful applicants tend to work harder and find opportunities to show off their talent—even if it isn't for their dream job at first.

That may mean doing work at high schools, minor leagues, or for local bands and micro-celebrities for little or even no pay, just to build a portfolio and make connections. There can be a gap between an applicant's high expectations of the job, and what that job actually entails—whether it's due to something as common as differences with co-workers, something larger such as unethical decisions, discovering that the pleasure of being a fan is diminished after transitioning to employee status. The key is to seek out opportunities, no matter how small, and use those experiences to build your network and portfolio.[8] In other words, this is a "foot in the door," not "door in the face" industry.

Sports teams often employ a sports information director to promote and craft narratives for athletes, teams, and leagues, as well as build relationships with the local community. In the entertainment realm, a publicist represents a celebrity and will pitch stories to news media, develop partnerships, and navigate crises.

Health Care is an area with significant demand for communication specialists. The range of potential positions in health care is vast, and includes everything from research institutes and family planning clinics to pharmaceutical companies and end-of-life facilities. This role may involve internal or external communication—or both—with employees and the local community.

Education has been another area of growth for communication specialists. This includes jobs at K-12 schools and local school districts, as well as jobs in higher education. Typical duties include internal communication to employees, as well as external communication to targeted audiences, the local community, and general public. *See the interview with Mary Knight in Chapter 13.*

Corporations is an area where PR and Strategic Communication professionals can be employed in-house by their client. In the corporate setting, communication professionals can be involved with everything from internal to external communication. Professionals charged with internal communication tend to focus on day-to-day communication between managers, senior leaders, executives, and front-line employees. These types of communication can include emails, newsletters, speeches, and annual reports. In the external setting, professionals can be charged with reaching out to media organizations with news releases, responding to interview requests, training leaders on how to answer interview questions, or taking charge of social media accounts.

A common communication-related position in **Government** work is that of a public affairs professional. They are responsible for communicating with the public on behalf of a government entity at the local, state, or federal level. A communication job at the federal level may be for a branch of the military, programs such as NASA, or regulatory agencies like the Environmental Protection Agency. Duties typically include communicating more frequently with the general public rather than narrow target audiences, fielding questions, as well as promoting and maintaining a positive public image for the organization. In addition to working for the government, PR professionals are used by corporations, nonprofts, and regular citizens to lobby lawmakers for the purpose of influencing public policy at the local, state, and federal levels. *See the interview with Tegan Griffith in Chapter 11.*

Tourism is one of the largest industries in the world, and communicators are typically tasked with finding ways to attract visitors to a location, whether it's a single resort, a larger city, or an entire nation. This is one area of specialization in which strong social media skills are a necessity, as online communication is now the primary means of promoting tourism for most entities. Understanding the importance of visual storytelling and having a grasp of the psychology of persuasion are therefore critical to success.

Again, these areas of expertise are not comprehensive, and many of the categories overlap in practice: A sports information director may work at a high school or university, for example, while someone working in tourism could be a state or federal employee. Think of these general areas of expertise as you would think about different types of music. There's natural overlap between different genres, with no single agreed-upon list, and if you were to walk into a few different record stores, you'd probably have a few different lists.

One final distinction worth noting is perhaps the most common in PR and Strategic Communication, which is working "in-house" or at an "agency." Working in-house means someone is employed by an organization, and works in a communication role for that organization. Working at a firm or agency means someone is employed by a PR firm that has a roster of different clients. Some agencies are a one-stop-shop and offer nearly every service imaginable, while others specialize in certain areas, such as video production or crisis communication. *For more, see the interview in Chapter 1 with Alyssa Giaimo, who described her experience working in-house and at an agency.*

Now Hiring: Sample Job Listings

What do employers look for?

It depends, of course, on the employer and the situation, but below are a handful of sample job listings curated from the first two pages of search results of Indeed.com in 2024—starting with some entry-level positions, and moving on to more senior positions.

These listings are not intended to be comprehensive or exhaustive, and are provided only to lend a sense of job titles and descriptions as well as what employers tend to value in prospective employees. *Click the job title for an archived version of the listing.*

- Marketing and Communications Associate
  - University of Utah
  - $46,000-$53,000
  - 1 year experience or 2 years education required
- Public Relations Associate
  - BOLD, LLC
  - $59,000-$70,000
  - Bachelor's & 3+ years of relevant experience
- Marketing Content Specialist

    - Exact Sciences
    - $61,000-$98,000
    - Bachelor's & 3+ years of relevant experience
- Public Relations and Marketing Strategist
    - Utah Transit Authority
    - $62,500+
    - 6+ years of experience
- Marketing & Communications Director
    - Special Olympics of Missouri
    - "Salary commensurate with experience"
    - 5+ years of experience
- Director of Marketing and Communications
    - Southern California Orthopedic Institute
    - $150,000-$205,000
    - Experience requirement not listed

Eagle-eyed readers of the text will also tell you that in each chapter, the interview with an expert always concludes with advice for students who are about to enter the field. In many cases, that person has been where you are right now—so it makes sense to heed their advice.

Future Directions

Any attempt to predict the future is audacious and a bit silly. There are simply too many known and unknown factors and intervening variables at play. Still, it's worth a brief follow-up on three major themes that have risen in prominence in recent years, as they are likely to endure.

The first is customer experience. Customer service is part of the customer experience, but so is the ambiance and atmosphere of moving through a physical space, and the navigation of a company's website. In an era where it's easy to copy an idea or a business model, it's more difficult to replicate a truly exceptional customer experience at every touchpoint. Consumers appreciate companies that are detail-oriented and find ways to maximize the joy and minimize the points of friction at each of those touchpoints, and tend to reward those companies with their loyalty and positive word-of-mouth.

The second theme is of the twin concepts of authenticity and transparency. By now, these concepts aren't new, but they remain an important philosophical approach that forms the bedrock of an ethical and effective communication strategy. The way in which a company communicates with stakeholders and non-stakeholders contributes to its brand image, and becomes part of the customer experience as well. Just think about the companies, brands, or celebrities that you gravitate toward. Many of the most popular tend to have an authentic style that is believable and trustworthy.

The final theme is adapting to new technology. Just as you might be reluctant to hire a carpenter who doesn't know how to use a nail gun, you might also be reluctant to hire a carpenter who doesn't know how to properly use a hammer. Ideally, you want someone who is familiar with both, and appreciates when, why, and how to use one tool rather than another. The same can be said of new technological tools and social media platforms: It's easy to be enamored with and distracted by flashy innovations. In the final analysis, they are ways to reach and communicate with an audience.

There is, however, one technological advancement deserving of its own section: AI.

Generative Artificial Intelligence[9]

Amara's Law states that there's a tendency to overestimate the effect of technology in the short-term, and underestimate its effect in the long-term. Artificial Intelligence was first conceptualized in the 1950s, and by 1970, a prominent computer scientist predicted that "In…three to eight years we will have a machine with the general intelligence of an average human being…able to read Shakespeare, grease a car, play office politics, tell a joke, and have a fight. At that point, the machine will begin to educate itself with fantastic speed. In a few months, it will be at genius level and a few months after that its powers will be incalculable."[10] That prediction wasn't necessarily an outlier, as others working on AI felt that timeline was only slightly optimistic, replying "Give us 15 years."[11]

What followed instead were decades of modest improvements. In the 2010s, common applications of AI included the development and deployment of chatbots, targeted ads, SEO optimization, and the monitoring and management of content on social media platforms.[12],[13] Practitioners who used tools like Google Analytics often did so without thinking of it as a form of AI, but it had already become part of their daily routine.[14]

> *"Technology is neither good nor bad; nor is it neutral."*
>
> —Melvin Kranzberg[15]

Fall 2022 changed the way the public and practitioners viewed AI, as Generative Artificial Intelligence (GAI) services like ChatGPT, Google Bard, Copilot, DALL-E, Stable Diffusion and Midjourney were made publicly available. To be clear, certain analogues including chatbots are characterized as GAI, but the fundamental difference is that the new "GAI tools aren't just guiding and helping you search or find things; they are creating something new."[16] Together, GAI constitutes "the most accessible and useful form of AI for the average, non-technical person."[17]

In the short- and medium-term, the production of text, images, and audio/video will be augmented and likely supplanted by the use of GAI.[18] Early results of text-to-video GAI tools also show promise and are projected to circulate and improve rapidly.[19] Taken as a whole, the magnitude of technological changes in the first 18 months are staggering. And these Large Language Models (LLM), which scan and generate text, are improving quickly. Experts estimate that the rate of improvement is such that the overall capabilities will double every 5 to 14 months.[20]

> *"The single most important thing to understand about AI is how fast it is moving."*
>
> —Dario Amodei[21] (2023)

The implications of AI on the job market for PR and Strategic Communication practitioners is unclear. It's possible that "AI isn't going to take your job. A person skilled with AI will take the job—or jobs—of people not skilled with AI."[22] There is widespread belief that GAI will expedite routine and creative tasks, and that this won't result in job losses—rather, practitioners will spend time crafting stories, building relationships, and working on big-picture strategies.[23] A recurring claim is that creativity and a "human touch" cannot be mimicked by a machine.[24,25,26]

It's difficult, however, to reconcile this optimistic vision with the reality of GAI tools enabling work to be done in a way that's better, faster, and cheaper. A sobering analysis called out such idealism as "a rose-tinted dream that AI will free up practitioners to focus on strategic counsel, even if this means the loss of many junior and technical PR roles, once they are delegated to robots."[27] This prediction presaged GAI and the oncoming wave of "EZ Bake" creative content that can be generated by a few well-placed keystrokes. GAI tools are in various stages of development and effectiveness, and successful practitioners will adopt and adapt accordingly—but GAI has arrived, and it's here to stay.

When GAI tools enable anyone to have immediate access to a synthesis of data that simulates knowledge, and the ability to instantly generate text, audio, and video, it can change our collective notion of what it means to be an expert and content creator.

To put it bluntly, if these tools allow nearly anyone to create average-looking content instantaneously, what expertise do you bring to the table that justifies your paycheck? This is no longer a hypothetical question.

For all the changes that the social media era brought about, we may one day look at that decade or so with wistful nostalgia, thinking of how simple life was before the disruption of GAI.

An optimistic view may hold that human connections become more valued, in which case authenticity, transparency, and ethical behavior by individuals and organizations may be rewarded. At the very least, prioritizing such qualities will result in more enduring and meaningful relationships.

As with any other relevant trend or innovation, prudent practitioners will continue to track developments and expand their working knowledge in this area to understand when, where, why, and how to use GAI to their advantage.

Experts Talk Back:

Three Questions with Karine Delage, President of Karyzma Agency in Toronto.[28]

Karyzma Agency specializes in entertainment PR, and has represented a range of cultural figures, including actors, fashion designers, musicians, and athletes. Delage began in the industry at age 8, writing for her school newspaper, and soon covered the MTV Music Awards, Billboard Music Awards. She later founded Karyzma Agency, and in recent years received a "40 Under 40" award.

Q: How has PR changed in the last 15 or 20 years since you've been in the field?

It's changed a lot, even in the past 10 years.

Your pitch has become more important because media members don't always have the time to read a full-on press release, and they also may not take the time because they're short-staffed.

They may not have time to talk to you on the phone either, so you must have proper etiquette with email. You have to be very specific and to-the-point, because if you send them a long pitch or two, you could be put on their "Delete" list…You can write in your pitch the angles you want to cover, and base that on the specific journalist.

Q: A quick follow-up to that. You mention sending a brief email and finding the right

journalist when you have an idea for a pitch. Can you explain how that process works a bit more?

You need to do research all the time. With journalists…a lot of people have been let go, a lot of people like to go off on their own and freelance where they have five or six different publications they'll work for—it's a whole new era.

It's important to do research because say there's a journalist who covered Usher last week—and your artist is similar to Usher—you could hit them with a nice DM if you don't know the person, and ask them kindly if it's possible to send an email and pitch you something. And more than likely if you send them a DM over LinkedIn—and LinkedIn is my best friend, too—it depends on how you approach media, but most of the time, they'll be nice enough to give you their email and you can pitch to them if you don't know the actual person. Because there's a million journalists out there and you can't know every single one, especially if you're trying to pitch in another part of the country.

That's what I try to tell everyone, because they'll say "Oh, you're getting so much coverage for the client this week or next week," and they think it will continue to be that way the following week, and I tell them "No," because it's going to die down a bit.

In each of the 50 states, there are about 10 morning shows—at most, 20. But for easy math, let's just say there are 500 morning shows at a bare minimum. Even if you get 10% of that, that's 50 pieces of coverage. Even if you get 5%, that's 25 pieces of coverage. It's just a matter of doing your research. It's time consuming, but it's worth it because those morning shows always need content to talk about. And of course, you're not always going to get Good Morning America—you have to be realistic. It depends on your Client. But if you go to one of the Dakotas or Wyoming or the smaller states, they'd love to cover it. And when you build that coverage up, you're building your portfolio and your Client's profile as well.

So what I did a couple of months ago is I went through all of the states and made my own list of morning shows. You can't always think that you know everything. You have to set aside time to research—especially in PR because things change so quickly.

Q: I'm sure each day is different, but what might a typical day look like for you?

PR is so diverse that your day-to-day will switch around. Like you have a music festival for example, that you need to do PR for. That may be unlike what you did yesterday, which was call-backs for brands. So it's very diverse, and it keeps you on the edge of your seat because there's something else happening.

I have a monthly calendar and a daily planner, and usually plan out what I'm going to do in the morning and the afternoon.

Early in the morning, I'll usually do all my media follow-ups, so that way you have the rest of the day to answer emails versus having to go back and forth. And then in the afternoon, I'll usually have a project I'm working on, or contacting someone about a partnership or something like that.

That being said, when I wake up, I go to the gym or pool. I always find time to work out a little bit and go for a walk because even if you're busy, you need to set aside time to take care of yourself. You'll find in PR that we're always pretty busy, and most of the time we're sitting in front of our laptops. So I always try to keep a balance between Normal and the crazy-busy PR side.

And I work in a different time zone (Montreal), so time zones are something you need to be aware of. When you start working in different time zones, you need a schedule.

Q: What are some of the most valuable skills for folks to have in their first few years in the PR field?

Be creative. Be the person that brings ideas to the table.

That's what's going to separate the intern who is just doing what needs to be done for the job versus the intern who wants to grow and it's going to show in your results in the end.

If what you're doing is not working, try to think of other angles. Basically, stay in your own lane, but create stuff—don't follow. Just keep on learning.

And I know I keep saying this, but it's so important: I have a lot of experience now, but I keep pushing myself to research and learn more, and stay up to date on trends. There's a tendency to think you know everything because you went to school, but the danger is that you're trapped in a box. You need to think outside the box, since that will make you so much better than someone who is working inside this little box, thinking "oh, this is the way things *should* work. I'm not going to seek out an idea outside of this box." That's how I see things

Summary: Putting it All Together

Successful practitioners tend to be good at many things and outstanding at a few things.

In the years to come, those who are able to leverage new technological tools to their advantage will find themselves in demand. The summary from Chapter 1 serves as a relevant reminder here, so let's end where we began:

> The roles, expectations, and idea of what it means to practice PR has always been in flux alongside changes in technology. As technological tools evolve, so do the ways of attempting to engage a particular audience. Those changing roles for PR practitioners leads to a demand for new skills and training for those roles.[29] Over time, the contours of PR and Strategic Communication are determined by these changing conditions.[30]
>
> At the same time, the functional aim of Public Relations and Strategic Communication remains the same: To communicate the right message at the right time in the right place to the right audience.[31]

Public Relations and Strategic Communication *has been, is, and will continue to be* part art, part science. Any strategic approach should be rooted in science—or a solid theory about what will work and why—and the tactics to carry out that strategy should then be executed creatively.

There's a balance between the two. Too much science, and you may wind up with bland messaging that is little more than background noise. Too much art, and you may wind up with scattershot messaging that could cause someone to crack a smile, but doesn't compel them to act.

PR and Strategic Communication is also about building relationships that endure and connecting with the local community. Those relationships include everything from clients and co-workers to your extended professional network. So-called "soft skills" will continue to separate the exceptional practitioner from the average practitioner.

As parting advice, a number of things spring to mind, including curating a portfolio, establishing a professional online presence, following industry leaders, applying for internships, volunteering, getting involved in PRSSA, finding your passion, having a moral compass, acting ethically, and constantly learning and being open to new ways of doing things—and all of those are important.

But for all the knowledge and specialization that's required to succeed in the field, be sure to allow yourself the grace of enjoying a healthy work-life balance. After all, "life moves pretty fast: If you don't look around once in a while, you could miss it."[32] We're all stranded on the same spinning ball of mud hurtling through space, and none of us have made it out of here alive—so, yes, be kind to others, but remember to be kind to yourself.

Take a deep breath. You've got this.

P.S.: This text is a living document, and the intention is to update it at least once a year with different anecdotes and ways of introducing concepts. If you've made it this far, I'd appreciate your feedback!

Drop me a note at nathanrodriguez@weber.edu

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One last note: This text is a perpetual work in progress. If you have questions or feedback, drop me a line at nathanrodriguez@weber.edu. Instructors: Let me know if you'd like supplemental teaching materials.