

**Allan Thain's**

**MANAGEMENT OF  
COMMUNICATIONS**

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### **ABOUT ALLAN THAIN**

Allan is a seasoned Public Relations Specialist and runs his own Public Relations firm, A. J. Thain & Associates. He's also an acknowledged expert on the Internet, computers and software. For several years he has shared this knowledge with listeners as host of C-FAX Online and The TechTalkZone heard on various Radio Stations and along the Net. He's been a Government Advertising and Communications Director and continues to advise senior level politicians on media strategies and issues management. Allan is an award winning radio and television copywriter and producer.

### **ABOUT THE MANAGEMENT OF COMMUNICATIONS**

Many communications managers have come up through the ranks. They are writers, designers, media relations and audio-visual specialists or former journalists who, because they have been successful in their specialized fields, have been asked to take on the broad responsibilities of planning and managing complete communications programs.

This guide has been designed to help these people – those who have recently or may soon be called on to accept broader managerial responsibilities.

Its content does not dwell on communications theory, but on the systematic steps and approaches the communications manager must take to design and carry out practical, professional and effective communications activities.

We believe it will be of great value as a practical reference source that communication managers can use regularly in the course of their daily work.

It is yours....for the better “Management of Communications”.

**CONTENTS**

1. The Technique of Planning
2. Advertising
3. Exhibits and Displays
4. Special Events and Ceremonies
5. Media Relations
6. Power Point/Video/DVD (Visual Media)
7. Communicating with Special Publics
8. Writing, Editing and Publishing
9. Marketing
10. Developing Technologies in Communications
11. Communication Research
12. Communications Planning, Budgeting
13. Contracting

## **1. THE TECHNIQUE OF PLANNING**

This planning technique is designed to be adapted to any communications problem. The professional communications manager takes a systematic approach to every problem, no matter how small, and steps through each phase of the process.

**RESEARCH** is an attitude and a function. It means listening carefully and defining the problem precisely before you plan.

Set out the situation that creates the need for the activity.

Give a clear, concise, complete definition of the problem.

Study the background and history of the problem

Be clear on the causes of the problem.

Study any precedents in your organization or elsewhere.

Discover any relevant policy guidelines in your organization.

Read the relevant literature.

Review previous media coverage.

Canvass your entire organization from executive to field for views, intelligence.

Consider formal research – opinion survey or focus group.

Identify supporters and opponents inside and outside your organization.

Refine your definition of the problem – clearly, concisely, completely.

**PLANNING:** Based on your research, define your objective, set out and weigh the alternatives and select one.

Establish your objective – clearly, concisely, completely.

Set out the criteria that indicate success in meeting the objective.

Identify, specifically your target group (s).

Define the message you want to communicate.

Identify constraints you must work within – budget, policy guidelines, time, traditions, etc.

**PLANNING (cont'd):**

Set out the alternative ways of communicating the message to the target group within the constraints.

For each one – identify the benefits, the risks, the downstream consequences, and the cost.

Select one of the alternatives.

Based on the alternative selected, develop a tactical plan, specifying media to be used and creative approaches.

Develop a budget for your plan.

Bring the plan and budget to executives for approval and support.

**MANAGING:** Use the resources you have, most efficiently, to achieve the desired result.

Put someone in charge – give that person the responsibility **and the authority** to do the job.

With the project manager, identify the resources needed.

Look for resources first inside your shop.

If they are not there, go outside for PR firms, advertising agencies, writers, designers, etc.

Set an agreed timetable for the project manager.

Establish regular reporting dates and keep to them.

Make sure the reports include budget status.

**Leave the manager alone** to run the project.

But, be available to lead, discuss, comment, suggest and support.

If reports and progress are not satisfactory, reinforce or replace the manager.

Keep your supporters, inside and outside the organization, informed and on side.

Keep an eye on your opponents and move to neutralize them.

**EVALUATION:** Review what you did objectively and learn from it.

Get out the criteria for success you set at the beginning.

Gather the data you need to decide how you did against each criterion.

Informal: Internal discussions  
Reports from field offices  
Interviews with executive  
Interviews with outside experts  
Review media coverage

Formal: Evaluation built into plan  
Gather data by random survey or by survey of experts

Measure data against criteria.

Use inside group or outside experts to evaluate success.

Draw a conclusion – Repeat the project  
Revise the plan  
Reject it as a failure

Draw up a report on the project. If it is successful, use it to tell top management how well you did.

If not successful??

## **2. ADVERTISING**

### **THE AGENCY**

#### **How to Choose One:**

1. Decide what you need from the agency
2. Get a preliminary list from ad campaigns you like and business associates.
3. Find out what services they offer – research, media, creative, marketing, PR, website design
4. Ask for their client list: are they a general agency or do they specialize in an area that does (or does not) relate to you? Do they have experience in businesses or services similar to yours? Do they already have clients that conflict?
5. Check their clients for comments
6. Do you get along with their management? You have to be able to talk to them and be understood.
7. Will you have direct access to their creative and media people? It is the people on your account that count; not the name on the door.
8. All agencies charge the standard 15% on media billing, but what is their policy on charging for the other services.
9. Run competition among the top three or four acceptable agencies. Pay them between \$2500 and \$5000 for their sales pitch – and keep the ideas.
10. Remember you want those most of all for their CREATIVE GENIUS and next for the MEDIA PLANNING. All the rest is HOUSEKEEPING.



**THE AGENCY (cont'd)**

**How to Use One:**

1. Before you call the agency, define clearly what you want to say and the target group.
2. It is the agency's job to come up with a creative and media plan to achieve what you want. It is your job to tell them what you want.
3. Bring the agency in early and let them do their job. Do not be the creative director.
4. Research is expensive! But ad campaigns are more expensive. It is better to test your campaign first.
5. Because ad campaigns are expensive, your senior people should talk to the agency.
6. Insist on talking directly to their creative people, so they will get the feel for their need.
7. The creative idea is the key – get that first and the rest will follow.
8. Do not settle for the dull and the ordinary. Push until you get outstanding work. If you do not, change people – or agencies.
9. Challenge the agency on its proposal and make them defend it.
10. Look for the ancillary and support ideas from the agency's marketing department.
11. Get the agency to help you sell the campaign to top management. They will want to and they will be better at it than you – but you control the presentation.
12. At the end of the campaign, get a full report from the agency, including tear sheets, tapes, etc.

**CREATIVE**

1. ***THE CREATIVE IDEA IS THE MOST IMPORTANT PART OF THE ENTIRE AD CAMPAIGN.***
2. Spend a lot of time telling the creative people (both copy and art director) what you want. It is the most valuable time you will spend.
3. Ask them to come back with a range of ideas and to recommend one. Never accept just one idea.
4. Ask yourself first, "Does this say what I want to say to the people I want to say it to?"
5. If they have to spend a long time explaining it to you, it is the wrong campaign.
6. Is it memorable, exciting?
7. Do not bore people.
8. Do not irritate them either.
9. Do not neglect the emotions – reason is only half the person.
10. Is your story best told in words or pictures?
11. Are there any potential problems in the campaign? Will it offend people? Does it have negative connotations? Is it too close to someone else's campaign?
12. Do not be afraid to use research to test the idea.
13. If you are not happy, fight for what you want. Do not be intimidated. You are as smart as your agency.
14. Do not accept cost overruns. Get your money's worth.

## **MEDIA SELECTION**

1. Does the medium get your message to your target audience?
2. Is the medium suited to your message? Visual, emotional, verbal, simple, complicated.
3. The media department of the agency can tell you who each station and publication gets to - by geographic area, age, sex, and socio-economic status.

## **SPIN-OFFS AND SUPPORT ACTIVITIES**

1. Support your major ad campaign using the same creative work for promotional material, posters, pamphlets, displays, sales aids.
2. If you use a personality in your ads, try and create news and feature coverage around him or her.
3. Look for editorial time and space in the same media you advertise in, but do not use ads as a lever – news types do not like it!
4. Look to your agency's marketing and PR departments for help.

## **FEES, COMMISSIONS, CONTRACTS**

The basic revenue source for advertising agencies is commissions (usually 15%) which are paid to them by the media in which they advertise on your behalf.

Similar 15% markups are also normally applied to advertising production costs incurred by the agency on your behalf. Most agencies also charge fees for "advertising related services" they may be asked to perform for which they are not able to receive payment through commissionable media billing. These are usually calculated by multiplying the direct labour costs by a factor (such as 2.5 times). Before you hire an advertising agency, be sure you have a clear understanding with them as to:

- Which services are covered by commissions and which will involve fee payments.
- The basis for calculation of fees.

It is not necessary to have an overall contract with your advertising agency. However, many organizations prefer to have a contract which spells out the details of the financial arrangements and commitments on both sides.

### **3. EXHIBITS AND DISPLAYS**

#### 1. When to use exhibits and displays

Exhibitions are not a simple “mass” medium. They are a time consuming, costly, labour intensive way of reaching specific limited audiences. Consider using exhibits and displays:

- if your product or service is best shown or demonstrated
- if a show or event is targeted at the people you want to reach
- if you want face-to-face contact to explain your product or service
- if you want direct feedback from customers
- if you have something new, unique or different that will stand out in a crowd
- if your competitors are going to be there

#### 2. Decide on your objective

Be precise about what you expect to achieve

- Direct sales? If so, what is your sales target?
- Meet new prospects for follow-up?
- Educate and pass out information?
- A combination of the above?

Setting your objective will help you develop your design and theme, select the right people for staffing the exhibit and evaluate the effectiveness of your effort.

Find out from the exhibition the type of people who will be attending – Management? Sales? Technical? Lay Public? This will help you design an approach that will be successful.

#### 3. If you have decided to exhibit – get in early

Location is the key. The early bird gets the higher traffic locations.

Try to obtain space:

- near the entrance
- on main corridors
- close to main activity areas, i.e. restaurants

Avoid:

- remote corners
- narrow side aisles

4. Before calling in an exhibit designer, ask yourself these basic questions:

- Will the exhibit be staffed or not? By how many?
- Will I be distributing literature? Do I need racks? Storage space?
- Would the exhibit be helped by audio-visual components?
- Do I have an attention-getter or crowd-drawer? Remember, you will be in direct competition for people's attention with perhaps hundreds of other exhibitors.
- How much space do I really need to do these things?
- What shape exhibit would be ideal?
- Is the exhibit a one-shot or do I need to plan for storage, shipping and repeated use?
- What are my competitors likely to do based on: past experience, current intelligence?

Make sure that you have detailed information from the exhibition management so that you understand clearly in advance such things as:

- size and shape of spaces available
- height limitations
- availability of electric outlets, water, telephone, internet
- set up time and dismantling time
- Probable attendance both by gross numbers and types of people.

5. Prepare a preliminary budget  
Make an early estimate of costs. Be sure you include all the major elements:

- exhibit space
- design and construction
- shipping
- erection
- dismantling
- storage
- personnel
- Ancillary costs (promotion, literature, etc.)

How do these estimated costs check out with the results you hope to achieve from the show?

6. Hiring your designer/contractor

- Get competitive quotes
- Make sure the designer understands your requirements
- Make sure he know the exhibition's requirements and limitations
- Make sure he understands your budget
- Before hiring a contractor, check his previous record
- Check especially his record for meeting deadlines. With exhibitions, being late is disaster
- Be sure you are satisfied with the design. Does it do all of the things you want to do? Is it bold and clear even from a distance? Is it durable enough? Does it meet your budget requirements

7. Staffing the Booths

Exhibitions afford the opportunity for face-to-face contact with the public. But, you have to provide the personnel.

Based on the objectives you have set; determine what kind of people you need to staff your exhibit:

- Senior management?
- Sales personnel?
- Technical personnel?
- Personable people to hand out literature?

Beyond this, you will have to consider:

- How many people do you need per shift? One? Two? More?
- How many altogether? Remember, people cannot work 12-hour shifts six days a week.
- Do you have staff people available for staffing? If so, do they require any special training or expertise?
- Will you need to hire outside personnel? If so, what special background and training is required?

Before the show starts, make a detailed shift-by-shift plan for the staffing of the exhibition and stick to it. And, put someone in charge. A hundred and one things can go wrong on an exhibition site. At all time, one person at your booth should be in control.

Never leave your exhibit unattended. It looks sloppy and can frustrate and annoy prospective customers. It can also encourage pilferage or destruction.

8. Promote yourself

If you are coming to the party, let people know.

- Write to customers and prospects ahead of time and invite them to drop around
- develop special literature
- Use your existing advertising to announce that you will be there
- Use the exhibition's literature and promotion.
- Try to develop traffic stoppers or traffic promoters, such as: contests, audio visuals, celebrity visits, demonstrations, be sure the times are clearly shown on your booth and elsewhere.
- Use the local media – eg with celebrities, use your salesmen to get prospects there.
- Use signs and display elsewhere at the exhibition

Consider giveaways:

EITHER something that will make your presence more visible at the show (shopping bags, buttons, hats)

OR something that can be taken away and used over a period of time (pens, rulers, etc.)

The ideal giveaway is something with a direct tie-in to your products or service.

9. Make use of the exhibition's facilities

Find out what facilities and services are provided by the exhibition and use them.

- Is there an official program? Make sure you are listed. Consider advertising in it.
- Are there free tickets allotted to exhibitors? Get them and use them.
- Are there notice boards or display boards? Use them.
- Is there a press room? Be sure your material and/or personnel are on hand.
- Is there a VIP entertainment lounge. Find out and make use of it.

10. Evaluate your performance

Use the criteria and goals that you have set for yourself as the basis for your evaluation.

This can include:

- direct sales and orders received
- number of sales prospects
- gross number of visitors to the booth
- quantity of literature distributed
- number of enquiries answered
- or any combination of these



#### **4. SPECIAL EVENTS AND CEREMONIES**

Almost every communications plan involves some special events which will require special treatment.

This involves two sorts of events:

1. Things the organization does in the normal course of events which you can take advantage of.  
Some examples are: annual meetings, Opening of New Plant or Premises, Announcements of new product, service or model
2. Those special events you “create” to further your communication goals.  
Some examples are: Providing an award or awards dinner, developing a special “day” or “week”, Special conferences, Sponsorship of athletic or cultural events

#### **Some General Rules:**

1. Make sure you know about all the events planned by your organization well in advance and assess their potential publicity value in terms of your communications objective.
2. Get people involved. Hold a meeting of all responsible people. Make sure everyone who might have an input is involved.
3. Delegate. Spread the workload. Give specific tasks and responsibilities to all members of the committee.
4. Give yourself time. With special events, you only get one kick at the can. Material that arrives a day after the event is worthless.
5. Follow up. Plan regularly scheduled meetings of your committee to ensure that all elements of communications are on schedule.
6. Follow through. Don't let your guard down on the day of the event. It is the most important part.
7. It may be invaluable to do a “dry run” of the event a day or two in advance.
8. On the day of the event, make sure you show up early and double-check all essential elements.
9. Plan for disasters. As much as possible have contingency plans for last minute foul-ups such as: inclement weather, failure of VIP or speaker to appear, change of date or venue.
10. Assess and evaluate. After the event prepare a detailed report. Be honest. This is how you will improve future performance and cut down on errors.

## CHECKLIST FOR SPECIAL EVENTS AND CEREMONIES

The following checklist can be used for any type of ceremony or special event. Not all elements are applicable to all occasions. Special items may be added when necessary.

1. Where
  - Size
  - Weather Cover
  - Access
  - Parking
  - Directional Signs
2. When
  - Conflicts
  - Media deadlines
  - Relevance to Event
3. Who
  - Host
  - Master of Ceremonies
  - Chairman
  - Guests
4. Statements/Speeches
  - Advance Tests
  - Photos
  - Speaking Text
5. Advertising
  - Publicity
  - Promotional Material
6. Invitations to:
  - VIP (Minister, Senator, Gov.Authorities, Reg.Authorities, Religious Leaders)
  - Media (national, regional, local, ethnic, community)
  - Other departments
  - Other governments
  - Other companies
  - Suppliers
  - Customers
  - Neighbouring people

CHECKLIST FOR SPECIAL EVENTS AND CEREMONIES (cont'd)

7. All Printed Material
  - Translation
  - Proofing
  - Clearance
  - Release Dates
8. Photos, videos/DVDs, projections, props, signs etc
9. Communications
  - mikes
  - pool sound outlets
  - TV outlets
  - Internet
10. Radio, DVD/Digital player
11. Flags
12. Head table size in relation to the number of officials
13. Podium, lectern, sound system, emblem or insignia
14. Simultaneous translation
15. Floor Manager
16. Telephones
17. Security
  - guards
  - insurance
  - traffic
  - fire regulations
18. Seating of officials and guests on stage
19. Protocol to be followed in the order presentation
20. Reception room where VIPs will be met before the ceremony
21. Transportation of VIPs from airport to hotel, to site and return

CHECKLIST FOR SPECIAL EVENTS AND CEREMONIES (cont'd)

22. Buses (if needed) to tour the area, or bring delegates
23. Air or train scheduling, reconfirmation, schedules
24. Flowers for officials or guests
25. Escorts and guides
26. Plaques, gifts, mementos
27. Rehearsals, if necessary
28. Final Briefing
29. Agenda
30. Songs, anthems, music
  - legal
  - requirements
  - protocol
  - recording or live
31. Coffee, lunch, bar, etc.
  - number of people expected
  - menu selection
  - where
  - when
32. Media Area
  - Tables
  - Security
  - Computers/High Speed Internet
  - Phones
33. Registration of News Media
34. Media Kits
  - design
  - printing
  - material
  - distribution

CHECKLIST FOR SPECIAL EVENTS AND CEREMONIES (cont'd)

- 35. Photographer
- 36. Additional Checks
- 37. Budget reviewing
- 38. Monitoring and Evaluation Report

## **5. MEDIA RELATIONS**

### **TEN PRINCIPLES**

1. **Set a Strategy**
  - Decide on your message
  - Set your priorities about the media
  - Identify the specific parts of each network, publication or station, editors, columnists, specialists, beat reporters, news shows, feature writers, etc
  - Identify Method of Communication
  - Develop a specific strategy for each one
  - Work with your friends, counter or convert your opponents
2. **Learn the Mechanics**
  - Know the news deadlines and release to meet them
  - Know the differing requirements of each medium
  - If you make it easy for them, you will get better results
3. **Get the Rules Straight**
  - Have a clear understanding on when you are speaking “on the record”, “off the record”, “not for attribution” or “for attribution to an unidentified source”.
4. **Tell the Truth**
  - If you cannot tell something, say so and explain why
  - If you do not know, say so and find out
5. **Be Fair**
  - On major stories, everybody should get the story – at the same time.
  - Rotate release times so as not to favour one medium or publication
  - The journalist who comes to you with a story should get first crack at it.
6. **Treat Journalists as Professionals**
  - They have a job – you have a job
  - The aim is mutual respect.
  - Drinks and dinner are not a substitute for hard news

## **TEN PRINCIPLES (cont'd)**

7. Nothing Succeeds Like Interdependence
  - If you both need each other tomorrow, the coverage is more likely to be fair.
  - Get close to the key journalists, so you are not looking for an introduction when all hell breaks loose
  - Be there with the good news – and the bad news.
  - Be a teacher – you can upgrade your coverage.
  
8. Fight Back
  - Correct incorrectly reported facts
  - Object to unfair coverage
  - Forgive and remember
  - Remember, the journalist has the last word.
  - A new good story is better than the correction of an old one.
  
9. Do Not Forget Who You Are Working For
  - Represent the concerns of the media to your executive but your first responsibility is the other way around.
  
10. It is the Pattern That Counts
  - One bad story will not kill you
  - It is a pattern of bad news that hurts
  - One good story is not enough
  - You need a pattern of good news over time.

## **DEVELOPING A MEDIA STRATEGY**

- Step 1 – Decide on your message. It may vary from group to group.  
Step 2 – Pick your target groups.  
Step 3 – Pick your media and develop a specific plan for each one.

### The National Media

- Each network and publication has its own characteristics, biases and audiences.
- Find the person on your beat or the one most favourable to you and get to know him or her.
- Package your message specifically for each medium.

### The Wire Services

- A special form of national medium
- They can give you wide coverage, especially in smaller centres.

### The Press Gallery

- Everyone is there and easily accessible, but just because it's easy doesn't mean it's best.
- There is an official point of view and a Press Gallery point of view and you may want to get beyond them.

### Specialized Media

- For the special professional or interest groups, often their own media are the best route.
- They often have more knowledge and greater interest.

### Columnists, Commentators and Feature Writers

- They are powerful
- They often cross media lines and should be dealt with individually, separate from their publication, network or station.

### Editors

There are two kinds:

1. Editors that set news policy, and decide what to cover, who to assign and how to play the story are important, powerful, and hard to get to.
  - o Find out who is important to you and try to gain their understanding.
  - o Give them good hard news and they will play it
2. Editors that write editorials should be communicated with. Remember that editorials aren't the most widely read feature of newspapers, but they are important for opinion leaders.



TV and Radio Clips

- Make TV and radio news clips and send them to stations.
- If they are professional, newsworthy and give information, not a sales pitch, most stations will use them. They are usually stowed for “live” material on their local newscasts
- The more specifically local, the better
- Some film production firms specialize in such video clips.

Public Relations Firms

- If you can't, often they can
- They may be of most value in local situations, where they know their own media better than you.

The News Conference

*ALWAYS  
DECIDE ON YOUR COMMUNICATIONS OBJECTIVE  
THEN  
DECIDE WHETHER TO HAVE A NEWS CONFERENCE  
OR NOT*

Do:

When the story is important enough to warrant pulling a bunch of journalists away from their offices to hear it  
When you want to give more detail than you can in a written release  
When you want to create some excitement  
When you have a range of subjects to communicate about, but always have an objective  
When you want an opportunity to comment on previous news stories but it would be inappropriate to initiate the discussion.  
When you want TV and radio coverage  
When you have graphics or visuals  
If you are a good performer on your feet.

Don't:

When the story is simple and uncomplicated and extensive explanation or comment is unnecessary  
When you want precision uncluttered by comment or expansion.  
When you are unwilling or unprepared to answer a broad range of questions on the subject

The News Conference (cont'd)

Don't (cont'd):

When the news conference will lead to questions on subjects that will overshadow the message you want to communicate

When the news conference will likely be devoted mainly to questions that will put you on the defensive and create negative publicity.

If you are not a very good performer on your feet.

**News Conference Tips:**

1. Use a chairman or moderator to open, close and handle problems.
2. Open with a short, clear statement. The essence of your message should be usable as a short clip on TV and radio.
3. Rehearse your statement and the answers to all possible questions.
4. Have your statement prepared as a handout and distributed before you speak.
5. If possible use graphics to illustrate your main point. Television will love it.
6. If you expect detailed questioning you can't handle, have expert backup present and work out in advance how you will introduce them if needed. Use them gracefully and minimally.
7. consider giving television a separate statement and interview to increase the chance of their using the material you want used.
8. don't overwhelm the working press with your own people
9. most news conferences don't need refreshments, but occasionally the can help set a tone
10. Use the "Checklist for Special Events and Ceremonies".

## MONITORING AND ANALYSIS

Keep track of the media coverage you are getting through:

- Staff comments
- Press Clippings
- Broadcast monitoring

Analyse the results and take appropriate action:

- Do some stories get better play than others?
- Are you doing better in some media than in others?
- Are there recurring mistakes or misunderstandings about your organization throughout your media coverage?
- What action can you take?
- Ask your self “Why?” to the above situations

Use your analysis of media coverage to keep your management informed regularly of problems and issues.

## THE NEWS RELEASE: A REMINDER

1. WHO, WHAT, WHEN, WHERE, WHY
2. Use it for simple stories that don't require a great deal of amplification.
3. Use it for stories where you require precision.
4. Make sure it's news, not just self-congratulations, a sales pitch or old stuff.
5. Don't forget the title
6. Lead with the lead, Follow with the details
7. Give a contact name and phone number
8. Give a release date and time; immediate or some time in the future.
9. Use quotes from a specific person. They will get more use than unsourced material.

## **6. POWER POINT/VIDEO/DVD (Visual Media)**

### 1. Consider Visual Media when:

- your product or service is highly visual
- your story is complex and can be made clearer through demonstration or animation
- your audience might not take time to absorb your story in written form
- your audience cannot cope with difficult written material (eg – young children, recent immigrants)
- you wish to stimulate emotional responses with sight, sound and motion
- you want to deliver a consistent message to widely scattered audiences
- you want to give your message a sense of importance or glamour.

### 2. Planning:

- visual media productions can be expensive. Before you spend, plan
- Be specific about the message you want to communicate
- Is your message able to be translated into visual form?
- How will a visual medium convey your message more effectively
- Define your audience. Who, where and how many?
- Is your production for repeat use or one-shot?
- How soon do you need it?
- What are your budget limitations?

### 3. Think Distribution First

- consider each potential mediums and ask yourself:  
Will it reach the audience I want to reach?  
Is it available?

#### Potential Media:

##### 1. Internet Distribution

- ... Will internet users be interested in seeing your Video – Video/audio streaming can be tricky
- ... Are they the audience you want?
- ... Will you post it on your website?

**POWER POINT/VIDEO/DVD (Visual Media) cont'd**

2. Commercial Television
  - ... Check in advance with network and station program people.
  - ... Find out their requirements and interests.
  - ... Assess the potential for television exposure of your media
  - ... Will it get to the audience you want?
3. Community and Cable Television
  - ... Contact community channels in advance
  - ... Cable outlets are particularly interested in material with a local flavor. Also material that is “educational”.
  - ... Limited audiences, often with special interests.
4. Special Interest Groups
  - ... Identify the special interest groups interested in your production
  - ... Talk to them
  - ... Line up opportunities for showing your video at lunches, seminars, conventions, workshops, meetings, etc.
5. Lending Libraries
  - ... Contact private and public video/DVD lending libraries and arrange to have your production listed with them.

## **POWER POINT/VIDEO/DVD (Visual Media) cont'd**

### 4. Selecting the type of Production

Proper pre-planning will provide a good guide to the type of visual media most suited to your needs.

Principal types are:

#### Video/DVD

- quicker to produce and less expensive
- excellent for training
- sound and visual quality is very good
- TV screen playback equip widely available

#### Power Point

- Inexpensive
- Quick to produce
- Easy to change
- Excellent for limited use productions
- More static and limited than video
- Software not reliable?

#### Website

- The internet website should be your electronic brochure
- A content Management System will allow you to change content
- Remember Content is King and must be updated regularly
- Do not waist a lot of money on a site nobody will see
- There should be a source for the media where you post Media releases, pictures etc.

#### Film:

- Large budget proposal
- 35mm for commercial theatres
- Excellent visual and sound quality
- Most expensive
- Production time is lengthy
- difficult to make changes
- Print cost high

## **POWER POINT/VIDEO/DVD (Visual Media) cont'\**

### 5. Start with a good shooting script

Regardless of the type of production, a good script is the most important element in any visual media production.

Writing for video/film is a highly specialized job. Use a professional scriptwriter either from your staff or outside.

Make sure you are completely happy with the script before you go into production:

- Does it really get your message across clearly?
- Is it interesting?
- Does it make full use of both visual and audio possibilities
- Can it be done? Can it be done within the time frame and budget you have set yourself?

### 6. Hiring a producer

There are a wide variety of production houses. Look for affirm with experience in the type of production you have decided on.

- Get at least three competitive quotes based on your shooting script
- Ask to see previous work – it is a good guide
- Talk to previous clients about their experience
- Consider cost but also the soundness of the company and its personnel. Do not always take the lowest bid.

### 7. Control the Production

When a production house has been selected, do not just hand over the shooting script and wait for a final print. You may be disappointed and changes at that stage can be costly and time consuming. You should be involved directly at several stages, including:

- review of planned shooting sequences
- approval of actors and narrators
- approval of graphic or animation material
- approval of first rough cut
- approval of fine assembly and interlock of visuals and sounds
- approval of final print

**POWER POINT/VIDEO/DVD (Visual Media) cont'**

8. Evaluate your Success

Evaluate the success of your production in relation to the target audiences you have defined. Keep track of:

- how often your production was used
- in what medium
- to who and how many
- what type of audience
- use response cards for audience reaction
- reviews by film or art critics
- do survey research on results of film
- awards



## **7. COMMUNICATING WITH SPECIAL PUBLICS**

Most communication programs include some special campaign directed at special publics. Reaching these publics requires special planning approaches.

### 1. Types of Special Publics

- professional groups (doctors, social workers, teachers)
- occupational groups (barbers, truckers)
- special interest groups (environmentalists, human rights workers)
- hobby or avocation groups (boaters, stamp collectors)
- groups with other definable characteristics (your own employees, the very rich, etc.)

### 2. Know why you want to reach them

- do I have a product or service that requires a special approach to these groups aside from my other communications? If so, what is it?
- What do I want specifically from this group?
  - o Direct sales?
  - o Enquires?
  - o Better understanding?
  - o Changes in attitude towards me?
- Determine why you need to single them out and what you want from them. It will help you shape your message
- Be precise. Do not try to reach all engineers if you really only need consultant engineers.

### 3. Use Research

Special groups lend themselves to research because they have definable characteristics and are of manageable size.

Especially use research for:

Developing a target group profile

Define your group by

- age
- sex
- occupation
- physical location
- hobbies or interests
- purchasing habits

Or any other pertinent information

## **COMMUNICATING WITH SPECIAL PUBLICS cont'd**

- Do they read a lot? What? Newspapers? Magazines? Trade journals? Technical Publications?
- Are they heavy or light television viewers
- Use research also for pre-campaign and post-campaign measurement of changes in buying trends, information levels, group attitudes

Special groups lend themselves to researching changes which can help you evaluate the effectiveness of your program.

### 4. Design your message

Determine beforehand what it is you want your target group to do and shape your message accordingly.

- Do you want them to buy your product or service?
- If so, ask them to and tell them how, when and where to do it.
- Do you want to change their attitudes or opinions?
- Do you want a direct response? If so, encourage it. Use coupons, mail-in cards, interactive Websites, premium inventories to build response.
- Be careful – if you encourage direct response, make sure you can handle it. Estimate in advance the probable return and prepare for it. Encouraging customer action and then not following through promptly is worse than doing nothing.
- Make sure your message is clear and simple and personal. And be sure it reflects the interests of the group. You have picked this audience for a reason – be sure that your message shows an understanding of their particular needs and wants and tells how your product or service can help.
- Offer them something. You want the group to do something for you – tell them what you will do for them. You have identified this group as special. Consider what special offers you can make them, such as:
  - o An opportunity for more information
  - o An opportunity for a personal demonstration
  - o An invitation to some event
  - o A membership
  - o A free sample
  - o A price reduction
  - o An introductory coupon

## **COMMUNICATING WITH SPECIAL PUBLICS cont'd**

### 5. Develop your mailing lists

Not all communications programs to special groups require the development of mailing lists, but they are very often basic to a good campaign. A clean, accurate and comprehensive mailing list gives you a solid connection with your group which you can use in many ways.

- Use a professional mailing list service where available. It is probably cheaper and less work than trying to do it yourself.
- Keep your list up-to-date. Be sure changes are handled promptly
- Keep your list clean. There is no point in sending material to someone who no longer wants it or needs it. Clear your list once a year by sending recipients a self-addressed change of address mailing card.

### 6. Select your media

The range of media that can be used for special publics is as broad as for any campaign. But, for special publics, certain media tend to be more widely used.

- **Direct Mail**
  - o One-Shot mailings – good if you have something new or different to offer. One time costs for lists can be expensive.
  - o Newsletters – good if you have a stable group and if you have got something interesting to say on a continuing basis
  - o Personal Letters – good for small groups. Personal letters should be just that – not obvious form letters
  - o Inserts and Enclosures – Excellent if you normally correspond with the group anyway (invoices, cheques, etc.) Eliminates direct postage cost
  - o Bulletins – good for continuing flow of technical information, number your bulletins for easy reference.
  - o Website – Have them log in and fill out a questionnaire
- **Published Material**
  - o What special material should I produce for this group?
  - o What existing regular material do I have that might be of special interest to this group?
  - o Examples: Technical manuals, books, annual reports, speeches, pamphlets and booklets

## **COMMUNICATING WITH SPECIAL PUBLICS cont'd**

### Select your media cont'd

- If you have an extensive amount of published material available, be sure you have a comprehensive, up-to-date listing in printed form available and circulate it. People cannot take advantage of your material unless they know it exists.
- **Specialized Publications and Broadcast Media**
  - Many special publics have special media which have grown up to serve them. Make use of these media to reach your public.
  - Providing editorial material – if your message is really interesting, you will get a good response. Most of those media are desperate for good objective material
  - Advertising – look for waste-free ad opportunities that go to your group alone. Identify and use the media that serve your public
  - Examples – trade service magazines, technical publications, professional journals, special interest magazines, association bulletins, year books, annual directories and indexes, special interest radio and TV programs
- **Direct contact**
  - Special groups lend themselves too many opportunities for direct face-to-face contact.
  - Tie in with what they are doing
    - Meetings
    - Conferences
    - Seminars and workshops
    - Exhibitions
    - Special events
    -
  - Plan how you can become involved by:
    - Providing guest speakers
    - Participation in panels
    - Supplying technical expertise
    - Providing Videos, Power Point presentations, literature

## **COMMUNICATING WITH SPECIAL PUBLICS cont'd**

- Mounting an exhibit or display
- Providing hospitality
- Stage an event
  - Consider how you can create events that will bring you together with your group
  - Sponsor or co-sponsor a seminar or conference
  - Stage an exhibition
  - Put on a lecture
  - Offer an award
- Provide a direct service
  - Consider offering a direct service to your group
  - Set up an information centre
  - offer personal sales or service calls

### 7. Monitoring and Feedback

Keep track of what your special group is doing and how they are responding to your campaign.

- Analyse direct feedback from the group
- Study all the special media that serve the group
- Use research
  - Direct questionnaires
  - Pre and post attitude and behaviour studies

## **8. WRITING, EDITING, AND PUBLISHING**

All communications programs need good writers and editors. Some rules for obtaining the best possible talents.

1. Writers and Editors are not necessarily the same people
  - Some writers are good editors
  - Some editors are good writers
  - Most are not both

If you are staffing and have enough positions – hire both writers and editors. If you are hiring on contract – go for the specialist.

2. Match the writer/editor to the job  
All writing jobs are not the same – nor are writing skills.

Do you want:

- News writing?
- Magazine writing?
- Technical writing?
- Radio writing?
- Film or Television writing?
- Report writing
- Speech writing?

Match the experience and skill of the writer or editor against the particular job you need.

3. Consider whether you want staff or contract writers and editors:

There are advantages to having good writers and editors on staff:

- they get to know your business inside out;
- they learn the organization's rules, sensitivities, taboos
- they are motivated by career aspirations;
- they know your people
- they are physically on the premises

There are disadvantages too:

- they may not have all the skills you need
- they may not write for all media
- they can go stale
- they can cost you money during slack periods

## **WRITING, EDITING, AND PUBLISHING cont'd**

Contracting for writers and editors has advantages:

- you can choose a specialist for each particular job
- you hire them only when you need them
- you pay only for delivered performance
- they can bring a freshness of approach

And disadvantages:

- they do not necessarily know your organization or objectives
- they may not know your people
- the one you want is not always available

Two general rules:

- A. Estimate your workloads and do not hire more staff than your peak workloads demand. Idle writers cost money and go stale faster.
- B. If you can afford it, have at least one good editor on staff. Even, if you freelance most of your work, you need someone to hire, brief, supervise and assess the work of your stable of writers.

### 4. Make best use of your freelance people

- Do not rely on one writer. If he breaks his arm, you are out of business
- Keep a good stable of writers and editors and know where and how to reach them fast.
- Make sure your stable encompasses a variety of skills (technical editors, scriptwriters, magazine writers, etc)
- Do some scouting. Always keep proper files of your writers and assess their quality and ability to meet deadlines. Weed out the bad; it is a buyer's market.
- Start small. Give a new writer or editor a small project to start with and work up. Do not give your biggest project of the year to an unknown quantity.
- Give them time. Freelance writers need some time to research the project and get to know your needs. Too much rush almost always guarantees an ordinary performance.
- Do no second guess too much. Remember, all writers have their own style. If the facts are correct, let the writer use his own words. Too much picayune editing can turn writers off and waste time.

## **WRITING, EDITING, AND PUBLISHING cont'd**

- Know how much to pay. Writing and editing services are not usually hired by tender, but by direct personal service contract. Get to know the going rate for various types of writing and editing and keep within the range, do not over buy. You do not need a pro with 20 years experience to edit a simple pamphlet.
- Cover all applicable official languages. Whether you are in the private or public sector, you may want to reach many language groups. Be sure your stable of writers and editors has people skilled who can accommodate for this.

## **PUBLISHING**

A major responsibility of any communications manager is supervising the organization's publishing program.

Publishing covers a great range of different materials of differing complexity:

- envelope inserts
- folders
- booklets
- newsletters
- newspapers
- brochures
- magazines
- technical reports
- manuals
- hand books
- annual reports
- corporate brochures
- books

### 1. When to Publish

Before you publish, decide whether you *should* publish. Ask yourself:

- Will the publication promote a legitimate need of the organization?
- Is the same material available in already published material?
- Is the target audience large enough to justify publishing?
- Is a publication the most effective way of reaching your audience?
- How does it compare with other media in cost?
- In effectiveness of presentation?



## **PUBLISHING cont'd**

### 2. Use Research

Determine in advance:

- your target audience
- their characteristics
- their numbers

Estimate your required quantity – The size of your market and print run affects costs. It helps determine the type of publication you select. For a major undertaking, do a market survey.

### 3. Plan your distribution

Based on your estimate of the market plan in advance, how will you get your publication into the hands of your audience:

- by mail
- through bookstores
- through other retail outlets
- through your own regional offices
- at exhibitions or other public events

### 4. Set your price

Decide whether the publication will be free or will bear a price tag.

Determine a reasonable price level considering:

- The cost of production
- The intrinsic value of the information conveyed
- The ability or willingness of your target group to pay
- The price of competitive or similar publications

### 5. Prepare a budget

Prepare a project budget in advance, taking into consideration:

- Production costs
- Marketing and distribution costs
- Expected Revenues (if publication is priced).

## **PUBLISHING cont'd**

### 6. Set your schedule

For every publishing project, set a realistic and detailed production schedule and stick to it. Make sure your schedule allows time for:

- research
- writing
- editing
- translation
- photography and illustration
- graphic design
- typesetting
- page make-up
- printing
- shipping

### 7. Brief your writer

Before you turn someone loose to begin work on the publication, be sure he knows exactly what you want and need.

He should know:

- the objectives of the organization that the publication is aimed at meeting
- the nature of the target audience
- the size and format of the publication
- the level of complexity of the material
- the level of language that would be appropriate
- whether the text will be supported by photos, charges and-or illustrations

Review the draft text carefully. Make sure you are completely satisfied before you go into production. Early changes are easy. Late changes are expensive.

### 8. Get your money's worth

When you have your finished publication – market it. Publications that sit on the shelf are costly and communicate nothing.

- Follow your distribution plan
- Consider advertising
- Use specialized media

Keep an accurate record of stocks on hand and if your publication is not moving – draw up a new marketing plan.

## **9. MARKETING**

Most organizations, whether in the private or public sector, have certain products or services that they wish to market to the public. These marketing campaigns form a separate and distinct part of the overall communications program.

### **1. Identify your market**

- Use research
- Find out the characteristics of the potential market for your service.
  - o Are they men or women? Or both?
  - o Are they old or young? Etc
- Is your market national, regional or local? This can be important in shaping your distribution and media strategy
- How many potential users are there? Estimate the size of your market and make preparations to handle the expected volume.
- Try to grade our market by potential:
  - o High potential
  - o Medium potential
  - o Low potential
- Direct your resources and marketing strategies at the highest group
- Learn the patterns of demand. Will the demand for your service have variations:
  - o By season or time of year?
  - o By day of the week?
  - o By hour of the day?
- Can the market afford to pay for your service?

### **2. Does your service meet the need?**

Having identified your market, ask yourself:

- Does my service go far enough to meet needs?
- Does it meet expectations? Will there be customer disappointment?
- Is my service available where the demand is?
- Is my service priced within ability and willingness to pay?
- Am I equipped to handle the expected volume of demand?

## **MARKETING cont'd**

### 3. Packaging your product or service?

Offer your product or service in a neat, coherent package. It will be more attractive to the client and easier for you to sell.

Does your service have a clear, catchy name?

- The name should be easily understandable – not “cute”
- It should describe the product or service
- It should appear physically on all material relating to the service
- A good name is a good umbrella for a group of related services
- Are all your related services included? Services of a similar nature aimed at the same target group should often be marketed together.

Do you offer a selection? Do you have a range of different services tailored to need? To budget?

Do your services cover all the potential needs of your market?

Should you add other related services to your package to make it more comprehensive?

Do you have a coherent pricing policy?

- Is there a charge for your services?
- If so, is it reasonable in relation to:
  - o Competitive prices
  - o The service offered
  - o The ability of your target group to pay
  
- Are your services priced reasonably in relation to one another?
- Does your pricing structure encourage trading up?
- Make the method of payment clear to potential customers – cash or time payment.

## **MARKETING cont'd**

### 4. Distribution

The more efficiently you take your service to the market, the more sales you will make. Choose your distribution system in relation to your customers.

Select your method of selling:

- by mass mail outs
- email - try not to use email to “spam” your sales pitch
- by telephone canvassing
- through existing retail outlets
- through your own outlets
- door-to-door
- through other institutions
- or a combination of these
- Excellent marketing opportunities exist through a website that features a “shopping cart” set-up.

The overriding factors in your choice are cost and accessibility of service.

Who will handle or work on your distribution:

- headquarters staff
- regional staff
- sales force
- sales agents
- contract agents
- retail clerks
- or some combination of these

Make sure your distribution system is adequate to handle anticipated demands. Failing to produce an advertised service is worse than not offering it at all.

**MARKETING cont'd**

5. Use your regions

Does your organization have:

- retail outlets
- branch offices
- regional headquarters

If so, consider can they be used to:

- promote or
- deliver your service?

If you are going to use your regional facilities, make sure they are plugged in to and are enthusiastic about your marketing project.

- Let them know the background and purposes of the promotion
- Give them all the details. Prepare special briefing kits
- Make sure they understand what is expected of them
- Provide them with the training necessary to do their job
- Give them the material they need and a channel or re-ordering
- Make sure they know about your advertising support
- Give them a contact point at HQ where they can discuss their problems.
- Give them specific goals and targets and ask for regular reporting
- Monitor their performance

Many, many good marketing programs have failed because of lack of follow through at the regional level.

## **MARKETING cont'd**

### 6. Promotion and Advertising

The same general rules apply as for all good communication, but remember – you are selling something, so:

- Stress the consumer's interest
  - o Do not tell them how wonderful you are. Talk about their needs and their problems. Make them want your service
  
- Give them the who, what when, where, why and how
  - o You want people to take action. Make sure they have all the necessary information. Tell them:
    - What your service is and what it can do
    - The range of services you have available
    - How much it will cost
    - How they will have to pay. If it is free, say so loudly. Free is still the magic word in merchandising
    - Where to go, call or write to get the service
    - Where they can go, call or write to get more details
    - How the service will be delivered
    - How long they will have to wait
  
  - o Give them all the details and ask for the order.
  
- Make sure you have ample promotional material
  - o Tailor your material to your distribution pattern
  - o You may need:
    - Booklets and brochures
    - Client mailers
    - Point of purchase
    - Display materials and/or audio visuals
  
- Use your material
  - o Set up a distribution system
  - o Set up a re-order system
  - o Spot check to be sure it is available and out on display
  
- Select your advertising media to reach the market of greatest potential
  
- Time your advertising to hit the market when it will be receptive
  
- Consider whether you can hitch-hike this service onto other corporate advertising

**MARKETING cont'd**

7. Corporate Identity

It is important that potential customers know who is offering the service. Tie your corporate logo in with the name of the service on everything you do:

- advertising
- signage
- point of purchase
- literature
- catalogues
- order forms
- vehicles
- direct mail

The corporate backing can be important. Make sure it is prominently displayed.



## **10. DEVELOPING TECHNOLOGIES IN COMMUNICATIONS**

A communications manager should be aware of developing technologies that can help him communicate better. Look for technologies that can help in:

- The production of the tools of communication
- The dissemination of the message

Consider these factors:

- Can this technology help improve the quality of my output?
- Can it help me reduce costs or staff?
- Can it help me reach more of the people I want more effectively?
- Can it help in the speed of my communication?
- Can it give me a competitive advantage?

Keep in touch with developing technologies by:

- Taking time to meet manufacturers' representatives
- Attending product demonstrations
- Attending trade exhibitions
- Subscribing to news letters
- Reading trade journals of your industry (i.e. Marketing) and the communication industry (i.e. Communications News)
- Talking to colleagues in your profession
- Observing what your competitors and others are doing.

Evaluate new technologies. Ask yourself:

- Can this new technology improve or replace something I am now doing?
- Is it at the practical stage yet – or is it something to watch for in the future?
- Can it help me:
  - o Communicate faster
  - o Communicate cheaper
  - o Reach a broader audience
  - o Get my message across more effectively
- How much will it cost?
  - o Compared to what I am now doing?
  - o Are there large initial capital investments involved

If you think a new technology can help – get all the details. Do not be afraid to ask for lots of help. The promoters of new ideas and new products need customers.

## **11. COMMUNICATIONS RESEARCH**

What is it?

There are four main kinds of research that you need to know about.

1. **Survey Research:** Used to find out what your audience thinks and wants and to evaluate the success of your communications. A sample of the population is taken. It is a **RANDOM SAMPLE** if you want to discover the views of the general population. It is a **STRATIFIED SAMPLE** if you want the views of a specific group in the population.  
A **QUESTIONNAIRE** is designed to ask your questions in the most unbiased manner possible.  
The sample is **INTERVIEWED** using the questionnaire by **EXPERIENCED INTERVIEWERS**. The best interview method is in **PERSON** and it is the most expensive. Next best is **BY PHONE**. Accuracy is lower but so is the cost. A **MAIL** survey is cheapest but the response is often low and uncertain.  
Some research firms have regular surveys that you can tack your questions on to. If the sample is right, this is just as good and cheaper than mounting your own survey.
2. **Focus Groups:** Used to test the message you want communicated to your audience **BEFORE** you launch major campaigns and expenditures.  
A small (10 to 20) group of the kind of people you are interested in is assembled and an **EXPERIENCED GROUP LEADER** shows them our campaign and lead a discussion designed to discover whether they get the message and also whether they like it.  
Usually at least two groups are held per location and it is best to test in every location that may have a significant variation in view.  
Typed copy will do for the groups. But the closer to finished work that is show, the better the results will be.
3. **Panels:** Used to test the progress of communications campaigns over time.  
A sample of the population group you are interested in is drawn. The same group is interviewed several times over a period of months or years to determine changes in attitudes.  
This is best when you are looking for long term results.

## **COMMUNICATIONS RESEARCH (cont'd)**

### **4. In-Depth Interviews:**

Used to find the view of relatively small and inaccessible groups not easily surveyed,  
To probe more deeply into specific results from other research or to get preliminary reference points for survey research.

Selected people from the group that interest you are interviewed in person at length (1/2 to 1 ½ hours) by highly skilled interviewers.

You are not looking here for quantitative results, but qualitative – or for deeply held views.

#### Why do it?

1. Research is a question of relative costs and benefits.
2. It is expensive – but communications campaigns are often more expensive.
3. Better to test first than blow the whole budget
4. Remember, research is meant to get the truth for you – not just reinforce your prejudices or provide you with a handy sales tool.

#### The “What If” Test

Never do researches until you administer the “WHAT IF” test to yourself. It comes in four simple steps.

1. Set down, precisely, the questions you want answered.
2. Set down all possible answers to the questions.
3. Then, for every answer, write down WHAT you will do IF the research produces that answer.
4. If different answers are not going to produce different actions, do not do the research.

## **COMMUNICATIONS RESEARCH (cont'd)**

### **5. How to Choose a Research Firm**

Your care about four things in a research house.

#### **1. QUESTIONNAIRE DESIGN**

Is it thorough and unbiased? Ask to see samples of previous work.

#### **2. SAMPLE DESIGN**

This is highly technical. Nonetheless, ask their expert to explain it to you. It should make sense.

#### **3. INTERVIEWING STAFF**

Are they intelligent, well-trained and experienced? Do they have the geographic spread you need? Ask to have the training described. Ask about the qualifications for employment. Ask about turnover and length of employment of staff. Ask where the staff is located.

#### **4. INTREPRETATION**

All of the above is worthless if they cannot interpret the data for you. Talk at length with the person who will interpret your research. If you are not convinced, forget it.

Find out if they use the 'WHAT IF' test. If they do not, why not? They will waste your money.

Make sure they are in the business of giving you objective information – not what you want to hear.

Look for regular standing surveys. They can save you money. Ask for their client list and check around. Interview several firms. Don't get intimidated. It is mostly common sense.

## **12. COMMUNICATIONS PLANNING AND BUDGETING**

**RULE 1** – Always work to a written communications plan. Do not keep it in your head – put it on paper

**RULE 2** - Make your plan comprehensive. Cover all planned activities and in sufficient detail. Your plan is your basic working document for the year.

A good, comprehensive plan serves several purposes:

- To sell the program to your management
- To act as a blueprint for your staff and others your work with.
- To establish workloads, deadlines and milestones throughout the year.
- To set your annual budget and help you stick to it
- To plan your personnel requirements – both staff and contract
- To help you in your evaluation activities

Your plan should be sufficiently comprehensive and precise to accomplish all these.

### 1. Research

Start with research. Pull together and assess all the pertinent research material you have:

previous research studies  
intelligence from the media  
competitor information  
field reports  
studies done by your organization  
trade newsletters and bulletins  
test market information

Determine whether you need more research to prepare the plan or more research during the year. Do you need:

- formal opinion research studies?
- more or better field reporting?
- news clipping service?
- broadcast monitoring service?

## **COMMUNICATIONS PLANNING AND BUDGETING (cont'd)**

Consider the evaluation you will be doing at the end of the year.  
Does this give rise to research requirements such as:

- pre and post market studies
- advertising testing
- test market studies
- general opinion surveys

If so, put them in your plan.

*Note: research and evaluation are continuous, ongoing processes.  
The research you do this year can help – evaluate last year's plan,  
shape this year's plan, prepare you for next year's plan.*

Finally, access and synthesize all available research. Prepare a  
“Background” section to your plan based on it.

### 2. Objectives

Always work to pre-determined, pre-agreed objectives. Before you  
start planning:

- obtain from your management their major corporate  
objectives for the year
- get any sub-objectives as well
- if you do not understand or if they are not clear – ASK
- get the management to tell you their priorities – which  
objectives take precedence over others.
- obtain from each operating section of the organization their  
objectives, sub-objectives, and priorities.

Then establish a set of communications objectives and sub-  
objectives:

- for the whole organization
- for each main operating area

Review these with the appropriate executives. When you agree on  
objectives, set them out clearly in your plan. Then start the planning  
process. As much as possible, quantify your objectives.

## **COMMUNICATIONS PLANNING AND BUDGETING (cont'd)**

### 3. Strategic Plan

Develop a general strategic plan for communications activities to support the organization's objectives.

Determine as precisely as possible the target audience:  
for corporate information  
for each operating group

Determine in broad terms the budget constraints for each  
Determine the major themes or messages you believe would be most appropriate or effective

Determine broadly what you want the target group to do as a result of your communications program.

### 4. Tactical Plan

For each element of the plan, establish a tactical approach.

- identify target groups in detail
- set out all the characteristics of these groups as learned from research
- Develop specific appeals which you want to make to achieve your objectives.
- Set priorities – major these, secondary theme, etc.
- Consider the media which you can use to reach these groups with these themes.
- Select your media based on:
  - ... Cost effectiveness
  - ... Coverage
  - ... Effectiveness in delivering the message
- Determine whether this plan can be brought in within general budget constraints. If not – make an adjustment.

**COMMUNICATIONS PLANNING AND BUDGETING (cont'd)**

5. Elements and Timing

Develop a detailed plan for each project in your communications program.

Break each project into its major elements

Set specific milestones and deadlines required for each element.

Indicate completion date for each project

Chart all major deadlines and milestones on a month-to-month basis to establish monthly budgets and work assignments and programs.

6. Budget

Your annual plan is the chief instrument for setting your annual communications budget.

Cost out every item of every project. Make sure you anticipate all costs.

Use previous experience (last year's activities) for budget items that are continuing.

For new items, obtain estimates from the appropriate trade

Allow for inflation – many of your expenditures may be more than a year ago.

On the basis of your work plan, estimate the cost of requirements for contract services and be sure they are included

Make a breakdown of your total budget by regions of the country to see whether it clashes with your organization's objectives.

Make a breakdown of budget by individual project so that you can measure budget vs. actual on a project by project basis for proper evaluation.



## **COMMUNICATIONS PLANNING AND BUDGETING (cont'd)**

Make a breakdown of budget on a month to month basis so you can measure budget vs. actual on a project by project bases for proper evaluation

Make a breakdown of budget on a month to month basis so you can have a meaningful control of budget vs. expenditure as the year progresses.

Make a breakdown of budget by element, i.e.:

- Personnel & Administrative costs
- Publications & Advertising
- Exhibits & Special events
- Media relations

So that you can relate your overall cumulative effort against objectives.

Review and adjust your budget on a monthly basis through the year.

### 7. Evaluation

At the beginning:

- establish evaluation criteria for all elements of the plan based on objectives
- decide who will be responsible for evaluation and have them monitor the project throughout the year
- determine what research may be needed for the evaluation and budget for it

At the end:

- assemble all information available on the project
- assessments by people within the organization
- assessments from without
- research
- media comment
- actual costs
- correspondence and other client reaction

Write an evaluation report for the appropriate executives within your organization

## **13. CONTRACTING**

Every communications manager must purchase a variety of services. He must also decide on a continuing basis when to use staff resources and when to contract – whether to “Make” or “Buy”.

### 1. Types of Contracting

Communications managers must make contract decisions on a wide range of tasks, including:

- writing
- editing
- translation
- typesetting
- graphic design
- production art
- printing
- photography
- film cameramen
- film and tape production
- radio production
- advertising
- exhibit design and construction
- distribution services
- research

### 2. In House or Outside Services

The two major considerations are:

- Quality of Product
- The Economics of the Decision

Analyse the requirements. Decide which can and should be done in house. Decide which should be contracted out. Your criteria: Quality and Economy.

Generally, use staff people when:

- the task to be done is steady and continuing
- it requires an intimate knowledge of the organization and its goals
- there is confidentiality or security involved
- the job requires someone’s continuing presence on premises

## **CONTRACTING (cont'd)**

Contract out when:

- the volume of work is low
- the work is short term or has seasonal fluctuations
- variety is a necessity
- special expertise is required
- special equipment or large capital outlay would be needed to do the job in house

Review – requirements change. Re-assess your program every year and adjust your approach accordingly.

### 3. When to go to tender

Contracted services may be obtained by direct purchase or through competitive tender. Generally, you will consider direct purchase when:

- The job is small. Do not call tenders on a \$500 assignment. It will waste your time and cost you money.
- Unique expertise is required
- Quality is more important than price
- The job is rush

Examples: specialized writing, photographers, translations

You will consider competitive tender when:

- the job is a big one and price variations can be significant
- no unique expertise is required
- the job is fairly specific and mechanical
- there are a fair number of competent practitioners in the field.

Examples: typesetting, printing, film production.

## **CONTRACTING (cont'd)**

### 4. Some general rules for Contracting

Whether you contract direct or through tender, you should know the following information.

Know your market. If you contract regularly for a particular service, you, or someone on your staff, should know the suppliers:

- how many are there
- where are they
- what is their specialty
- what is their track record
- how reliable are they

Keep files. Keep a record of performance. Learn from your mistakes.

Know the going rates. You or your staff should know roughly how much you should pay for a writer, a photographer or a mailing list. Keep your suppliers honest. Even the tendering process is not infallible. Sometimes, all the bids are too high.

Know the whole market. Do not just focus on local suppliers. Many jobs can be done as well or better by suppliers located elsewhere.

Be specific and thorough. Do not assume your contractor can read your mind. Make sure he has all your specifications, including:

- your message
- quantities
- quality of materials
- deadlines
- formats

Most mistakes occur through vagueness of instructions. Tender prices mean little unless everyone is quoting on exactly the same specifications.

**CONTRACTING (cont'd)**

Give sufficient time. A contract person needs reasonable time to learn your needs and do a good job. Tender calls should allow sufficient time too – if you want thorough, thoughtful proposals. If you do not give enough time, the best firms may ignore you.

Get a reasonable number of quotes. When you tender – do not invite every company to quote – you will waste a lot of their time and yours. Know the industry and select a reasonable number who you feel have the capacity and the expertise.

Rotate your suppliers – Avoid the lazy habit of always using one service. Try someone else occasionally or at least invite proposals. Keep yourself and your suppliers on their toes.

For more information, learning material, or to look for similar publications,  
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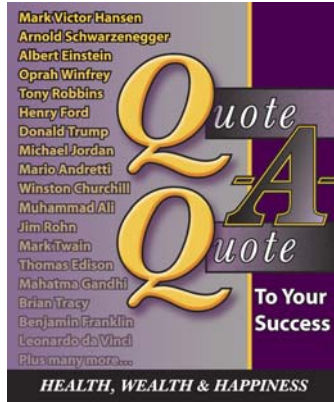
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