Turney's Tips
Tactical planning for public relations

Underlying assumptions:

Some public relations practitioners use *tactical planning* and *project planning* interchangeably, but they shouldn't. Although there are superficial similarities,—both focus on discrete, limited time efforts that may involve publications and/or special events—project planning is a short-term, stand-alone activity while tactical planning implies a much longer-term perspective.

True tactical planning is a direct outgrowth of and an attempt to implement an existing strategic plan. At the very least, it requires knowledge of the organization's key publics and its desired relationship with each of them, as well as an assessment of the current status of each of those relationships.

A tactical plan outlines specific, step-by-step actions intended to reach short-term objectives, while a strategic plan provides an overall focus and identifies long-term goals.

Working tips:

► The most common time periods covered by tactical plans are one, three, or five years, although many of the individual objectives will be reached far more quickly than that. The effort involved in developing a tactical plan isn't warranted for any period less than a year, and attempts to plan more than five years in advance are little more than guess work.

► Planning is not a quick, one-draft process. A meaningful public relations plan will not be produced by a single person working in isolation. It needs to be developed, reviewed, and revised over time by managers throughout the organization.

► Objectives are basically short-term goals that lead toward larger and longer-term goals. Usually, it requires that several objectives be met to fully reach a single goal. And, in some instances, the goal may never be met even though countless intermediate objectives are achieved.

► Objectives are often developed by comparing where the organization "is" now with "where" it wants to be at some point in the future and then defining a series of "stepping stones" it can use to get from the here and now to the desired future.

For additional information:

http://www.nku.edu/~turney/prclass/plan.htm — "Public Relations Planning" by Michael Turney.

Public Relations Campaign Strategies: Planning for Implementation by Robert Kendall (2nd ed.) HarperCollins College Publishers: New York; 1996

Chapters 18-19 in *Public Relations Writing and Media Techniques* by Dennis Wilcox and Lawrence Nolte. Harper & Row Publishers: New York; 1990.

Format and organization:

- The first page or section of a tactical plan lists the objectives it's intended to accomplish.

  - For project-oriented planners, the list of objectives may look like a giant *To Do List* of specific products—news releases, publications, speeches, etc.—that need to be produced or special activities— hosting an open house, creating a community advisory board, etc.

  - For relationship-oriented planners, the objectives are often a prioritized listing of which publics need to have attention paid to them.

- Developing this list of objectives, the first step in tactical planning, is actually step #11 in the overall public relations planning process. It's a direct outgrowth of analyzing the discrepancies between the ideal relationship your organization wants to have with each of its publics and the relationship it currently has with each of them (step #7 in *Turney's Tips: Strategic Planning for Public Relations).*

  - Start by brain-storming about all the possible things your organization could do to improve its relationships with its publics. Be sure to include at least one objective for each key public, either to improve a less than ideal relationship or to maintain a currently favorable one.

  - Pare the list down to a manageable number of objectives and prioritize them by considering how many people would be affected by each objective, the relative importance of these people, the estimated cost and ease of achieving the objective, and the likelihood of success.

- A separate page —or in some cases, a section of several pages— is set aside to describe the specific actions that need to be taken and the resources that will be needed to achieve each objective.

  - Putting each objective on a separate page makes it easy to vary format, headings, and sub-sections to best fit the objective rather than trying to force widely varied information into an arbitrary grid format. Separate pages also make it easy to update, add, or delete objectives as necessary.

  - Regardless of the format and layout, there are usually four additional planning steps applied to each objective.

- Step #12 involves listing the specific actions that need to be taken or the specific messages that need to be communicated to reach the objective. It also identifies the person or department who is responsible for completing each of these actions or delivering these messages.

- Step #13 estimates the cost of completing each action listed in step #12 in terms of materials and services, personnel costs,—salaries of regular employees and extra costs associated with hiring freelancers or contract specialists—wear and tear on equipment and facilities, time commitments, and sometimes even the "alternative costs" of having to give up or cut back on doing something else in order to complete these tasks.

- Step #14 is developing a schedule for starting and completing each action/message listed in step #12 as well as determining the anticipated completion date for reaching the objective.

- Step #15 outlines the criteria which will be used to evaluate whether or not the objective was successfully achieved.

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