

# **Defining Your Goals & Objectives; Making Your Plan Achievable**

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Newcomers to strategic planning sometimes think it's a standardized process that unfolds the same way in all circumstances and for all users, but that's far from accurate.

- Strategic planning is not, and should not be seen as, a one-size-fits-all proposition.
- Nor does all strategic planning follow a uniform and predefined set of instructions.

## **➤ In this context, I want to talk about three distinct but related topics:**

- ❶ the parallels between eating vegetables and strategic communication planning;
- ❷ an example of how things go awry when communicators lose sight of their goals and/or their audience; and
- ❸ matching the scope of your strategic planning to your organization and its needs.

### **❶ Why communication planning is like eating vegetables.**

As you were growing up, your mother probably told you: "You should eat more vegetables. They're good for you; they'll make you healthy."

- At the time, you may have gritted your teeth and shaken your head.
- Today, you probably believe it. You may even say it to your kids.
- At the very least, you accept it as reasonable conventional wisdom.
- But, you still may not eat as many vegetables as you should.
- Nor does necessarily this mean you like them.

Very similar observations can be made about strategic communication planning.

If you've attended very many professional communication conferences or workshops, you've undoubtedly heard experts say: "You should do more strategic planning for your communication projects. It's good for you; it will make you more successful."

- If you're like most communication professionals, you probably believe this. You might have even bemoaned the fact that you simply don't have enough time to do more planning.
- But, that doesn't mean you now do as much planning as you should. Nor does it mean that you like planning.

Planning is good for communicators, and it does contribute to the successful communication. But, it does take time and effort.

- It can be tedious, and it's neither glamorous nor exciting.
- It lacks the appeal and the challenge of media relations or crisis communication and, for most practitioners, falls short of providing the satisfaction and sense of accomplishment that completing a publication or a special event does.
- It's generally viewed as one of those things that should be done rather than something people want to do. It's like eating broccoli instead of a hot fudge sundae.

All communication planning is not the same. It can be as diverse as spinach, corn, and squash.

- Basic communication planning is like radishes. It requires very little preparation and is easy to take advantage of if you simply take a moment to do it.
- Other more complex approaches to strategic planning, such as PRSA's very popular 10-step process that was outlined by Kim Skeltis in an earlier session, are more like spaghetti squash than radishes. They require a bit of time and effort to prepare.
- And some planning methods are like brussel sprouts. If they're overdone – and they often are – they quickly become unpalatable.

In simplest terms planning in any profession is simply figuring out the best way to accomplish whatever it is that you want to do or to get to wherever you want to be. The basic concept is clear, simple, and straight-forward.

Planning sets goals, identifies objectives, and defines action steps that will lead to achieving the set goals and objectives.

For public relations practitioners, planning means identifying ...

- with whom you want to have a relationship,
- what you want from that relationship, and
- what you can do to achieve it.

## **② Why you need to keep your goals and audience in mind as you plan.**

**A real-life cautionary tale of an organization that didn't.**

**The names and location have been omitted to protect the guilty.**

This true story involves a well-established and highly respected Adult Literacy Council in a midwestern capital city. It happened more than a decade ago and long before the Internet was popular, but its cautionary message is as valid today as it was then.

The primary mission of this non-profit Adult Literacy Council was to teach adults how to read. Most of its clients were lower income, native born Americans who had simply never completed enough formal education to learn how to read or who had learning disabilities that schools were not equipped to handle decades earlier when they attended school. Others were recent immigrants who were literate in their native languages but not in English and who wanted to learn English.

- The Council had been operating for 7-8 years at the time and had a wonderful reputation for its multi-level success in teaching people to read, in attracting and training volunteers, and in raising money to support its activities.
- In fact, the Council had been so successful in teaching people to read that there was no longer a backlog of clients and it was running short of people who needed to be taught to read. Consequently, the Council decided to launch a promotional campaign to recruit additional clients.
- Prior to this, virtually all of its promotional efforts had centered on publications and posters. In fact, two of the Council's most recent brochures – one to recruit volunteer tutors and another to solicit donations – had received awards for communication excellence from the PRSA, IABC, and a statewide editors group.

Given its past successes, a very competent volunteer team of communication professionals and graphic designers eager to top their past achievements, and a desire to move quickly, the Council unanimously decided to once again use a brochure as the centerpiece of its campaign.

- The award-winning design team went to work and quickly turned out a beautiful and impressive three-fold, four-color brochure.
- 30,000 copies were printed and ready for distribution.
- The initial distribution was planned to be done at the Council's annual volunteer recognition dinner in early May.

In April, a few weeks before the upcoming volunteer dinner, the head of the graphic design team asked the Council's chairman if he could take copies of the brochure to the IABC chapter's next luncheon for "show and tell." The chairman not only agreed, he also attended the luncheon.

- There, the designer and chairman explained their need to recruit additional clients, highlighted the steps used to produce the brochure, and then passed out samples and waited for the praise to roll in.
- After what seemed an interminable wait without any comments, the designer began pushing for a response. Finally, there were a couple of nice but rather half-hearted comments about how attractive the brochure was and how nicely it was laid out.
- Realizing something was amiss, but not knowing what, the chairman continued to press for more responses and eventually asked, point blank, "What's wrong with it?"
- After an embarrassingly long pause, the senior and well-respected vice president of Bankers Life rose and asked, "Who did you say your target audience was?"

"Illiterate adults," the chairman answered.

"And what are their defining characteristics?" the VP asked.

After a bit of prodding and preliminary answers that included age, maturity, desire to learn, and low income, the chairman finally said, "They can't read."

"So, who is going to read this brochure to them?" the VP asked.

Until that minute, despite months of planning, countless design meetings, an extensive review process, and spending several thousand dollars on printing, the Council had never realized the inappropriateness of trying to use a written brochure to reach illiterate people.

The fallout began immediately.

- Before they left the IABC meeting, the embarrassed chairman and designer reclaimed as many of the distributed brochures as they could.
- Within a few days all 30,000 brochures disappeared and were never seen again.
- Neither brochures nor a need to recruit clients was mentioned at the volunteer dinner.
- And, for a number of years, several midwestern communication professionals could be turned beet-red just by asking them, “Wouldn’t you like to do a brochure?”

If the Adult Literacy Council had heard and heeded the advice Carol Scott gave us during her presentation this morning, this probably wouldn’t have happened.

- Do you remember her recommendation about having a one-page plan?
- And, do you always take time to develop at least a one-page plan before undertaking any new communication project or responding to a communication crisis?

### **③ Why quick and dirty planning sometimes suffices while other situations require more detailed and painstaking planning.**

All communication planning does not require the same amount of work, nor does it produce the same tangible evidence. The brevity, or even the complete absence, of a written plan does not necessarily indicate a lack of planning.

At its most basic level public relations planning can be compared to the rudimentary technique Professor Harold Lasswell developed for analyzing and modeling mass communication. His oft-quoted approach to studying communication boiled down to four simple questions:

- Who says what?
- In which channel?
- To whom?
- With what effect?

Whether you’re familiar with Harold Lasswell’s work or not, doesn’t this sound very familiar?

- Doesn't it remind you of something Kim Skeltis said just this morning?  
How about her reference to strategic planning as a "roadmap?"
- When Kim said, "The purpose of strategic public relations planning is to develop a roadmap of what messages will be delivered through which channels to influence key audiences," I clearly heard the echo of Professor Lasswell.

A slightly modified version of Lasswell's questions is a great start for public relations planning.

- What needs to be said?
- In what way?
- To which audiences?
- For what purpose?

If you can't clearly and concisely answer these questions before starting a communication project, don't proceed. You obviously have little idea of what you're trying to do or why you're doing it.

On the other hand, if you can answer these questions, it's fair to say you have done at least rudimentary planning.

- Whether you did the planning piecemeal and on the fly or all at once in scheduled planning meetings is irrelevant.
- Whether the planning was done in writing or only in your mind is also irrelevant.
- What matters is that you did plan and that you now have a clear idea of what needs to be accomplished and how you can go about doing it.

This isn't meant to denigrate formal, pencil and paper (or computer-aided) planning. There are times when such a level of planning is invaluable and absolutely necessary.

When more formal and detailed strategic planning is needed, the PRSA model – whether it's referred to as a "four bucket" or "ten-step" process – that Kim Skeltis presented this morning works very well and is widely used. If you're not used to planning, it's a good starting place.

- So is the fifteen-step public relations planning process presented in my online readings at <http://www.nku.edu/~turney/prclass/readings/plan2.html>. It combines strategic and tactical public relations planning in a single sequence.

Realize, however, that there are dozens of other equally useful planning models that have anywhere from four to thirty or more steps.

- Only by trying them will you learn which is best for you.
- The challenge for a communication professional is to select the planning process that most effectively fits the situations and organizations with whom he or she is working.

Whatever planning process you adopt, there's an additional caution I need to leave with you:

- Just because you've gone through the planning process, don't think it's over. Don't stop and sit back to admire your plan and wait for the accolades to pour in.
- Your plan shouldn't be considered final or finished until all of its goals have been reached or acknowledged to be impossible.
- Until then, look at it as a guide or a working paper that suggests things you can try to achieve specified objectives, but never let it limit your options.

Carol Scott said much the same thing this morning when she explained that strategic plans are meant to provide a "big picture" but are only the framework of a grand design and don't include all of the specific details. Then she added:

- They should not be set in stone.
- They need to be flexible enough to let you launch "opportunistic campaigns" and take advantage of unexpected developments..

Let me close with a reminder to never lose sight of these basics:

- **No matter how sophisticated your planning process becomes, the purpose of strategic planning – like the purpose of public relations itself – is to help your organization achieve its goals.**
- **And, you can't achieve any goals unless you have clearly thought about and articulated them and constantly keep them in mind.**