The Importance of Strategic Planning

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Your Agenda for the next two days

- Learn the elements of a good plan
- Goals, Objectives, Strategies, Tactics
- Practice writing
Recap from last year: Basic elements

- Statement of the problem or issue / background / situation analysis
- Business drivers / operational objectives
- Target audiences
- Key messages
- Communications Goals / Objectives / Strategies / Tactics
- Evaluation
What we didn’t talk about….

- Change
Rapid / Earth Shattering / Never Ever Happened Before…

…CHANGE
Rapid / Earth Shattering / Never Ever Happened Before Change

- Jul 2008 – oil peaked at $147.30 / barrel
- Jul 2008 – gasoline was $4+ / gallon
- Dec 2008 – oil was below $35 / barrel
Rapid / Earth Shattering / Never Ever Happened Before Change

- By end of 2007, $450 billion in collateralized debt obligations / $305 billion of those are now in default
- Sep 2008 – collapse of Lehman Brothers
- Oct 2008 – Bush Admin pushed through $700 billion bailout to purchase mortgage related assets
- Nov 2008 – First post-modern president is elected
- Jan 2009 – Obama Admin proposes $825 billion stimulus plan
US job losses by month

- September 2008 - 284,000 jobs lost
- October 2008 - 240,000 jobs lost
- November 2008 - 533,000 jobs lost
- December 2008 - 681,000 jobs lost

2008 (September 2008 - December 2008) - 2.6 million jobs lost

- January 2009 - 598,000 jobs lost
- February 2009 - 697,000 jobs lost
- March 2009 - 742,000 jobs lost
- April 2009 - 539,000 jobs lost
- May 2009 - 345,000 jobs lost

2009 (January 2009 - Present) - 2.921 million jobs lost

- May 2009 US Unemployment rate: 9.4%
Rise of Social Media in the Business World

- Facebook saw a 85.7% rise in unique users in 2008 (around 59 million)
- Twitter rose 752% in one year from Dec 07 to Dec 08 (around 4.5 million unique users)
- LinkedIn celebrated its 6th anniversary with 40 million users
The standard model of Strategic Planning

- Does it still work?
5 year strategic plan

- Mission
- Vision
- Critical Success Factors
- Assessment of the Present
- Strategic objectives
- Tactics
- Action Plan
A framework instead of a plan

- Communicate a grand design – core values; essential philosophy, design specs, brand – what is the essence of the organizational character?
- What are the issues that matter?
- Who are the people that matter? What do we know about them?
A framework instead of a plan

- Develop talent – develop depth in your organization so that as many as possible are responsible for the reputation, sales, success of the organization
- Be a visionary – know what success will look like so that you can describe it to others
- Learn and love the numbers – learn the business
A framework instead of a plan

- Do, Re-do, side with the Action Faction
- Embrace the mess, the paradox
- Love politics; love technology; love details; love sales
- Tell the story with passion
Your Brand

- Gateway to American Commerce
- Easier, Faster, Closer
- Strong Port, Strong Economy
Example: Issue Priorities

- Brand Visibility – to customers, decision makers, community
- Operational Excellence – improved performance is economically necessary, environmentally prudent and improves safety for your workers
- Environmental Stewardship – improved your practices and reputation
- Economic engine – recognition for the vitality you bring to your region
- Issues Management – connect our issues to decision-makers
Example: Priority Audiences

- Influencers – decision makers and those who influence them
- Customers
- Local activists – business, environmental, neighborhood
Example: Strategic Initiatives

- Brand Visibility
  - Translate our brand into examples that each audience will experience
  - PR for community relations & sponsorships
  - Strategic speaking opportunities
  - Opportunistic campaigns – connect the brand to our audiences
Example: Strategic Initiatives

- Issues Management
  - Connect operational, market issues to our influencers
  - Media-escalated complaints
  - PR support for govt / regulator affairs issues
    - White papers, presentations, grassroots advocacy
Example: Strategic Initiatives

- Operational Excellence
  - Internal PR support for training initiatives
  - Internal branding and opportunities to develop brand advocates
  - Identify and develop talent
Example: Strategic Initiatives

- Environmental Stewardship
  - Connect port performance with that of your customers – engage in their issues, serve as advisor and advocate
  - Evaluate and communicate projects that improve environmental performance
Example: Strategic Initiatives

- Economic engine
  - Community education
  - PR related to new initiatives
  - Media relations on performance measures translating into local economic numbers
Tools

- Community Relations
  - Events
  - Sponsorships
  - Education
- Traditional Media
- Social media – include bloggers, SEO, etc
- Issues Management
Tools

- Govt / Regulatory Affairs
- Brand Marketing
- Business Marketing
- Crisis Communications
Bottom line

- Write a comprehensive communications / marketing / public affairs plan
- But don’t get so far in that you can’t see the whole
- Let the big questions guide your day to day
What does that look like?
Answer: Project Plans

- Background
- Communications Plan
  - Objectives for each project
  - Media
  - Govt / Reg Affairs
  - Employees
- Messaging
  - Facts/Stats
- Action Owners
  - Timeline
- Budget

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Credits

- Portions of this presentation came from
  - Tom Peters Essentials: Leadership
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