

Please put the plan in front of the tools

By John Patterson, PRSA

Most communicators are highly skilled at creating tools like brochures and videos. We do this to please our customers, but tools without a plan or strategy can be highly ineffective. Developing plans for clients is one of the ways communications professionals truly add value.

The plan or strategy is your roadmap to reaching the desired results. You have to begin by understanding your customer's goals then creating communications goals that support what your customer hopes to achieve. I try to meet with the customer at least twice before developing my communications goals. By the way, I like to limit those communications goals to three or four per plan.

When the goals are done, I do a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis. This helps you clearly identify the positives and negatives. You have a better chance of creating a successful plan if you know the possible bumps or detours in the roadmap ahead of time.

After the SWOT, it's time to identify key audiences. I say audiences because there are usually more than one. Customers don't always understand this concept, so you sometimes have to do a little persuading. I like to begin by explaining the difference between primary and secondary audiences or internal and external. Understanding who you are trying to reach helps you define how you will communicate. It will also serve you well when it comes to creating the rest of the plan.

Key messages are next. Messages are what you want to say and what you hope the audience will hear. Some examples are:

- Everyone in our business should take responsibility for safety.
- A safer workplace can mean fewer injuries.
- A safer workplace can lead to a more profitable company.

Messages are the themes you will repeat throughout the communications effort. It's not enough to identify the key messages, you have to tie those messages to the appropriate audience and then determine the delivery method.

Now it's time to look at the tools (the brochures or videos). This can be tricky because your customer may want ten videos, but what that customer may need are a few Power Point slides and a targeted e-mail. I call this part of my plan the tactics. In this section, I identify each tool, its purpose, specific audience and the person responsible for creating it. Developing a tool just because you can is often a waste of time and effort. Think hard about the most effective tool for your customer and provide research to support your position. It's your responsibility as a communicator to help your customer match the right tool to the job.

Finally, you need to measure your efforts. Metrics are essential for many reasons. They give you a way to track your success. You could launch a survey before implementing your plan. Then do another survey when you're finished. Remember the goals? Go back and look at those to find out if you really assisted your customer in achieving the business goals. That's the best metric of all. When you help your customer succeed, you have truly succeeded as a communicator. We all know that communications can be difficult to measure. Finding solid metrics to demonstrate your effectiveness will help you convince those non-believers about the value that good communicators add to any organization.

Here's a parting thought for you to ponder. A former boss of mine liked to describe effective communicators this way. She said, "You need to be of service, not a servant." Putting the plan in front of the tools will help you be "of service."

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customers. This year, the Public Relations Society of America honored John with its national "Bronze Anvil" award for a safety video he created. John assures us the video was produced only after a comprehensive communications plan was developed.

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