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## **Evaluating Efficacy in Public Relations/Corporate Communication Programming: Towards Establishing Standards of Campaign Performance**

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### Abstract

This article suggests a generic model that includes a degree of standardization against which to compare planning and programming is the best way to establish excellence in public relations and corporate communication. The authors suggest this model can be (a) historically, to establish past campaigns; (b) used in the strategic planning process to identify problems or holes in a campaign; or (c) used as a final evaluation tool that provides evidence based in quantifiable data weighted to the particular needs of the company or client at a particular point in time. The key here is the generic value the hierarchical model gives to the profession and function—a way to evaluate excellence and provide hard evidence, data, on that evaluation.

Over the past two decades, a significant literature has developed that examines those factors most influential in creating effective public relations. The most prominent publications in this literature are the research on excellence in the practice of public relations authored by James Grunig, Larissa Grunig and David Dozier (Dozier, 1995; Grunig, Grunig & Dozier, 2002 & 2006; Grunig & Grunig, 2006) That research was groundbreaking in reliably identifying factors that allow public relations practitioners to increase their effectiveness in meeting communications goals for their organizations.

While the work that defined excellence in public relations has been significant and influential on the practice of public relations, unintended gaps exist that limit the overall utility of the work in assisting public relations professionals in meeting the goal of achieving overall

excellence in practice. The gap that is most noteworthy in this series is the lack of a specific definition of what determines excellence on the actual outputs of public relations professionals – specifically public relations programs and activities. This is not intended to diminish the importance of the work by Grunig, Grunig, and Dozier. Rather, its intent is to build on that research and to create a unified theory of what constitutes the full scope of excellence in the profession.

The focus of this paper is an exploration of those specific elements that are inherent in public relations and corporate communication programs and activities that are distinguished by their ability to effectively and efficiently achieve communications objectives. Part and parcel of this exploration is to set forth the standard practice for evaluating excellent public relations campaign activities. To do so, however, we must first examine the process by which campaign programming is conducted.

### **Establishing the Public Relations Campaign**

All public relations activities should reflect the goals and objectives of business, either for the client or for the corporation. Hence, public relations and corporate communication activities should be strategically focused on the larger business outcomes associated with business strategy. In other words, these activities should strategically impact on business outcomes. In establishing the campaign and its tactical activities the public relations/communication goal must reflect the larger business goals and objectives. Because excellence in public relations is often measured in terms of impact on its return on the investment by the corporation or client public relations outcomes must correlate with other business function

outcomes, such as marketing and management (Stacks, 2010; Stacks & Michaelson, 2011; Wright, 2002; Stacks & Bowen, 2011).

A goal is something that is wanted at the end of a campaign. An objective is a measurable outcome that leads to the accomplishment of some goal (Stacks, 2007). As Lindenmann has noted,

In setting PR goals and objectives, it is usually important to recognize that measuring PR effectiveness per se—that is the management of an organization’s overall communications activities with its target audience groups or publics—can be quite difficult to do unless the individual elements [outputs] of the program are clearly defined. (Lindenmann, 2003).

Goals and objectives, then, must be defined in terms of activities that clearly measure the outcomes that public relations and corporate communication activities are to influence. These activities can take the form of any number of different things—from media releases to opinion pieces, media kits to video new releases (VNR), blogs and tweets, and so forth. The key to determining impact is their strategic employment over the duration of a campaign. As Stacks has argued, a public relations campaign encompasses three phases: (1) developmental, (2) refinement, and (3) evaluation (Stacks, 2010).

- The developmental phase establishes the baseline against which final evaluations will be based on. It is in the developmental phase that benchmarks will be set to ascertain that at key points in the programming the campaign is on phase and target or whether objectives and tactics must be re-evaluated if not.

- The refinement stage occurs when the campaign is actually activated and contains the benchmarked points where objectives are evaluated as to being on phase and on target. Measurement here serves as feedback on progress, and allows for strategic changes in planning and/or tactical changes. The concept here is that few plans actually go according to target and schedule and that once the campaign is kicked off, counter forces or competitors (internal and external) will force changes. Campaign planning should never assume that the campaign is in a competitive vacuum.
- The evaluation stage occurs at the end of the campaign—often before the corporate or client campaign is completed—and correlates measures of public relations outcomes with business outcomes to establish effectiveness and return of investment in the function.

During the developmental phase planning must be focused on what part of the communication lifecycle the campaign begins with. (Michaelson & Stacks, 2011). An often erroneous planning assumption is that corporate campaigns always begin with building awareness, stemming from incorrect usage of the old AIDA marketing/advertising model developed by E. St. Elmo Lewis (Michaelson & Stacks, 2011, p. 5) that viewed the communication process of consisting of four sequential steps: awareness, interest, desire, and action. Michaelson and Griffin argued that the model, while focusing primarily on sales, could be adapted to public relations planning (Michaelson & Griffin, 2005). Their revised model can focus on planning for outcomes that include employee satisfaction, stake- and stockholder perceptions of the company, knowledge of the company, calls or action, and so forth. This model, as demonstrated in Figure 1, also suggests that if awareness is already built, then

planning should begin at phase two of the communication lifecycle—advance knowledge—while still measuring awareness. In planning for an action that may be opposed by certain publics or audiences, where prior research has demonstrated an aware and knowledgeable public or audience, planning should focus on the relevance of the company’s actions and persuade that public or audience to initiate action—cognitive-affective-behavioral—that will lead to advocacy of the company’s position.



Figure 1. The communication lifecycle

These outcomes regardless of the initial communication lifecycle phase referred to must be specific to the public relations function and must provide evidence—measurable evidence or benchmarks—of the impact of the activities across the campaign timeline. In general, there are three objectives that are generic to any public relations campaign: (1) informational, (2) motivational, and (3) behavioral. (Stacks, 2010). Further, they are sequential and provide important feedback in terms of projected benchmarks and help to refine, recenter, or refocus the activities if benchmarks are not being met (see Figure 2).

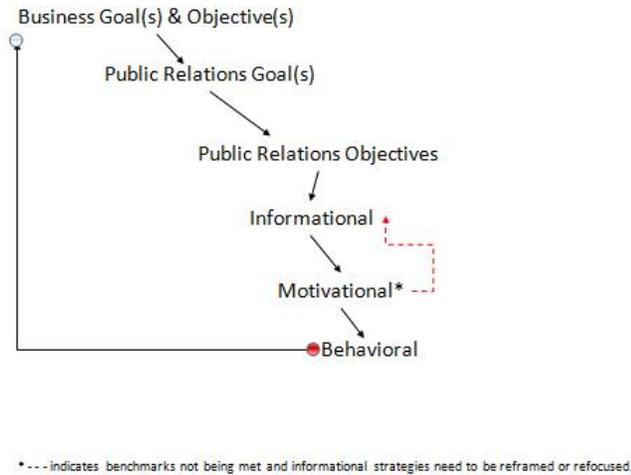


Figure 2. Relationships among goals and objectives

That is, if the messages being produced and transmitted through public relations activities are not being received, understood, and retained, they have not accomplished the informational objective of the campaign (to get the corporate or client message out to target publics or audiences). If the information is delivered and understood and retained then it should motivate the public or target audience to action. Motivation is attitudinal and either creates, bolsters, or changes an attitude. It does so through the target audience's evaluation of message logic (a cognitive outcome), emotional impact (an affective outcome), and intended behavior (a connotative outcome). If the informational and motivational objectives are being met, then the behavioral outcome—the actual response or action by the target public or audience—should be predictable. The behavioral outcome is then evaluated against the baseline measure for effectiveness (internal evaluation) and then against the actual public or audience behavior and correlated with other business outcomes to establish impact on business goals and objectives. Hence, return-on-investment (ROI) can be computed as a share of the public relations campaign contributions to overall success.

### **Campaign Excellence**

How can the public relations function or agency establish the impact of a campaign?

First, as noted by Michaelson and Stacks, it does so by following established standards of measurement and research (Michaelson & Stacks, 2011). Second, excellence must be defined. And, third, excellence must be evaluated. The questions then become what is excellence and how can it be evaluated. If it can be defined and evaluated, what standards should the public relations profession establish to create the excellence metric for programming?

According to Cutlip, Center, & Broom (2006, p. 87), “understanding how the profession has evolved provides insights into its functions, its strengths and its weaknesses.” In examining the history of public relations orientations to measurement and evaluation we find that from the beginning of the 20<sup>th</sup> century, a focus on evaluation was part and parcel of the counselor approach to public relations. The arguments for public relations evaluation are found in the works of the major agency and corporate heads—Lee, Bernays, Hill, Page—and can be observed in books and chapters on their impact on public relations practices and programming effectiveness (Cutlip, 1994 & 1995; Hill, 1963; Griese, 2001). Basically, the founding fathers of the profession argued that for public relations to be effective it must be a key function of senior management, it must counsel action and behavior, and it must be able to provide evidence of its effectiveness. Grunig et al., have taken these three points and made them part and parcel of “excellent” public relations practice (Dizier, Grunig & Grunit, 1995; Grunig, Grunig & Dozier, 2002). Stacks has argued that public relations effectiveness is found in the programming of non-financial indicators that correlate with financial indicators to produce a return on expectations (ROE) for stake- and stockholders, yielding a measurable return on investment (ROI) (Stacks,

2010; Stacks & Michaelson, 2011). The nonfinancial indicators are defined as how stake- and stockholders perceive an organization’s credibility, relationships, reputation, degree of trust, and confidence (see Figure 3). The basic model (see Figure 4) can be further stated as part of a mathematical formula:

$$\text{Outcome} = B \pm [\text{Credibility}^n \pm \text{Relationship}^n \pm \text{Reputation}^n \pm \text{Trust}^n] \pm \text{Confidence}^n + \text{Error}.$$

Where B is a constant, credibility, relationship, reputation and trust are the major nonfinancial variables which are modified by stake- and stockholder confidence in the company or organization to behave as proposed in the public relations campaign. Thus outcomes are a function of public relations planning around increasing or maintaining or countering competitor counter-campaigns through the manipulation these “owned” variables (Kelly, 2006).

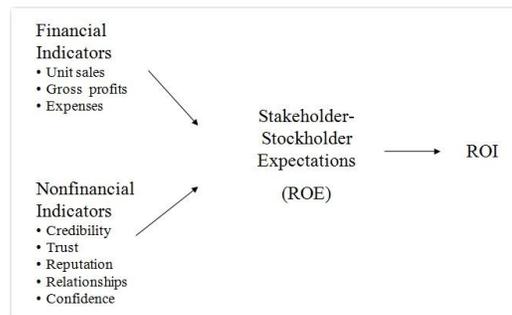


Figure 3. Relationship of financial and nonfinancial indicators to effectiveness

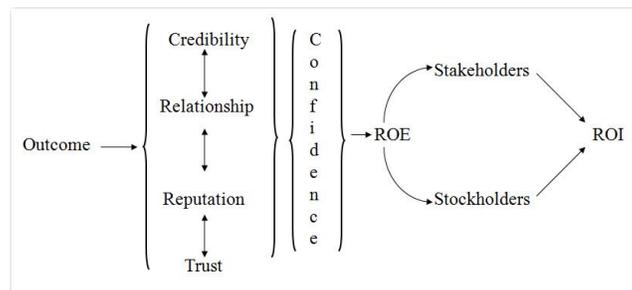


Figure 4. ROE/ROI model

This approach to effectiveness led Michaelson and Macleod (2007) to propose that public relations evaluation take on a “best practices” focus. Best practices argues that to be effective the planning must take into account programming that have clear, well-defined and measurable objectives; have a rigorous research design; include detailed documentation; link outputs to outcomes; demonstrate effectiveness and lead to better programming that is cost-effective and has quantifiable impact on business objectives; and be applicable to a broad range of outcomes. As demonstrated in Figure 5, best practices take into account the who, what, when (through the process approach advocated), and how of planning.

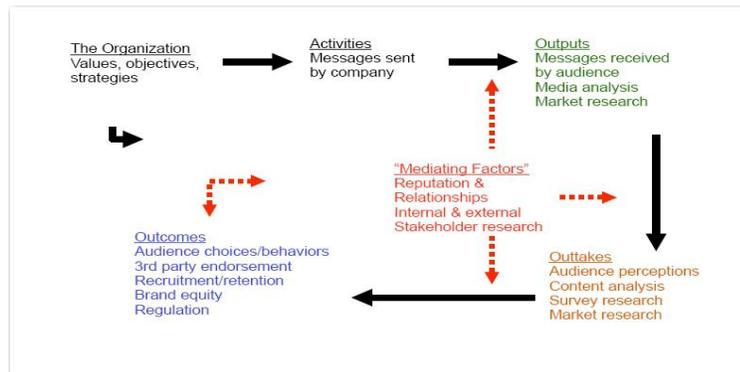


Figure 5. Best practices model of public relations practice

While best practices advance the profession’s movement toward excellence in public relations programming, they do not by themselves establish excellent public relations programming. For that we must turn towards an understanding of (1) what we mean by excellence, (2) how we can evaluate for excellence, (3) creating generic models of excellent public relations programming, and (4) establishing standards for its practice.

### Defining Excellence

Research into establishing a definition of public relations communications excellence began about twenty years ago. A team of scholars led by James Grunig examined what it took

for companies to practice excellence in communications (Dozier, Grunig, & Grunig (1995); Grunig, Grunig, & Dozier (2002); Grunig & Grunig (2006); & Grunig, Grunig, & Dozier (2006).

Based on a survey of corporate communication practices across industries and international boundaries they reported that companies practiced excellence in communications if:

- The senior management team was committed to communications excellence.
- The chief communications officer (CCO) reported directly to the CEO.
- The company was committed to tell the truth and prove it with action.
- PR and communication was more preventive than reactive.
- PR efforts began with research, followed by strategic planning, followed by the communications (or action) stage and always included an evaluation of communications effectiveness.
- The company was committed to conducting communications research that focused upon outcomes and not just outputs.
- The company was committed to education, training and development of its public relations and communications professionals.

Other criteria for defining companies which are excellent communicators can be found in:

- Judging criteria of major public relations awards.
- Secondary research such as generally accepted practices surveys<sup>1</sup>. And,
- Examinations of what various organizations are doing in terms of:

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<sup>1</sup> An example of a generally accepted practices or GAP study is the research conducted by the Annenberg School at the University of Southern California on generally accepted practices in public relations and corporate communication.

- Setting objectives,
- Research & planning,
- Identifying target audiences,
- Evaluating communications excellence,
- Establishing ROI measures for public relations and communications efforts, and
- Developing some general understanding about the contributions of public relations and communications to the business bottom-line.

Given the importance of excellence in communication, it seems improbable that public relations research has focused so little on excellence, either in terms of objectively quantifying it through measurement scales or subjectively qualifying it through informal, qualitative methods. While there are some case studies focusing on campaign excellence, for the most part they tend to stay away from non-crisis (hence attention-getting) topics. There are few professionals who doubt the impact of communications excellence on business success or that excellence in communications programming translates into a significant business advantage. We only have to look at what Procter & Gamble found when they measured the ROI of advertising and public relations relative to distinctly different P&G brands—public relations was much more effective than advertising on four of six brands (Weiner, 2006, p. 170). A similar finding was reported by Stacks and Michaelson (2009) in an experimental test of the advertising/public relations relationship, with public relations found significantly more effective on informational objectives than advertising for an unknown brand. In terms of trust, the Edelman Trust Barometer, a well-respected annual measure of public trust in public relations

vis-à-vis advertising finds consumers trust public relations over advertising on a 9-1 ratio (Edelman, 2012). And, finally, the Arthur W. Page Society's (2011) reports on the "authentic enterprise" explain how these concepts associated with effective public relations have an extremely positive impact on organizational effectiveness. It should follow, then, that companies which demonstrate excellence in communications (1) understand that in the programming of a campaign during the developmental phase that the issue is first examined from its location on the communication lifecycle, set the function's goals parallel to the business's goals, establish a baseline against which to evaluate the campaign and plan over time, and create three sets of measureable objectives with targeted benchmarks; (2) during the refine phase actively measure objectives relative to expected targets and phases within that campaign, alter or change tactics based on benchmarks, and continually scan the environment for unexpected events or actions; and (3) correlate the public relations nonfinancial outcomes (i.e., behavioral intentions) to business function financial outcomes as measureable ROI for its ROE planning.

### **Evaluating Excellence**

Once excellence has been defined in a potentially measurable way, it must be evaluated. There are several analogous organizational models found in the social scientific and organizational communication literature, all basically set as triangles. These models suggest that there are basic, "proponent" needs that must be satisfied before an organization can move to a more advanced level. Two that come to mind would be Maslow's "Hierarchy of Needs" social scientific model and Herzberg's "Hygienic Two-Factor Hygienic-Motivation" organizational model (Maslow, 1970; Herzberg, 1966; Stacks, Hickson & Hill, 1992; & Hickson,

Stacks & Padgett-Greely, 1998). Maslow and Herzberg's base level are equivalent in the campaigning process of "best practices." That is, to even be considered in the realm of excellence, the campaign must take into account variables that demonstrate and produce outcomes that meet the best practices standard. This is not to say that this level is an indication of excellence, but it is essential that its components are included and met. For instance, in Maslow's model the preponent needs are those needed for survival (often called deficiency needs, related to safety and health, and growth needs (those related to achieving growth). Herzberg's most basic level's preponent needs include individual (those related to working conditions, salary, and personal life) and organizational (related to supervision, policy and administration, and job security) needs. If an individual or company cannot meet these basic level needs, then survival is at risk. The same is true of any corporate communication plan or campaign.

#### Level 1: Basics

The model suggested for campaign excellence begins at the basic or preponent level (see Figure 6). It includes the five components discussed earlier:

- Setting objectives
- Research & planning
- Outputs
- Outtakes
- Outcomes (results)

Each component has criteria that must be met to ensure that a campaign will do what it is supposed to. Further, the components must be addressed in order, from left to right (see

Figure 6); each is essential to the next to ensure campaign success and demonstrate an impact on business goals and objectives. Finally, these components are objective and evaluated as to whether they have met a particular standard and are either present or not in a campaign.

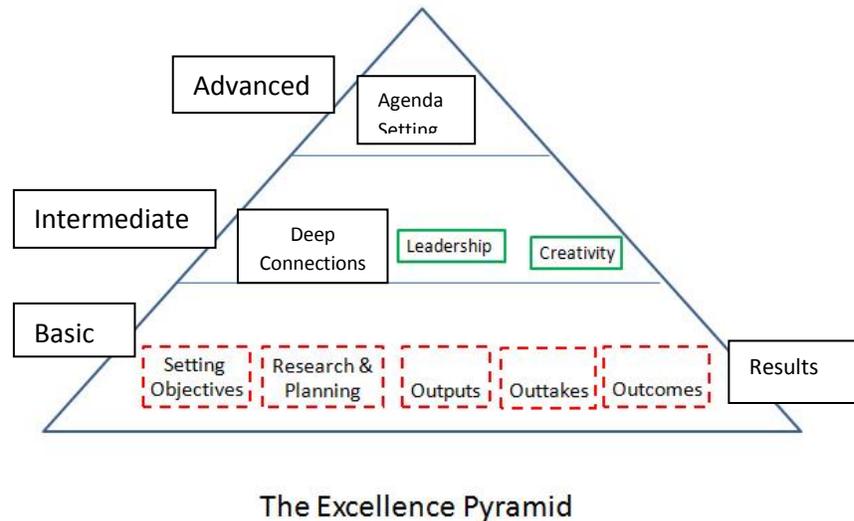


Figure 6.

Setting objectives. Setting objectives begins with an understanding of the overall goals of the business, the business objectives, and the communication goals. Goals are expectations and should be as explicit as possible. Objectives must be clearly defined in terms of stake- and stockholder identification (audiences) and must be measurable in term of business objectives. As such, most communications objectives will be correlated with business objectives as a measure of success. Further, the objectives should be replicable and build on previous communication and business objectives. If the objectives are not based on these criteria, then any planning and measurement will not be effective and excellence not obtained.

Research and Planning. The research and planning component focuses on specific sub-components that must be met to assure success. Thus, the campaign must be an executable

program that takes into account communication that is salient to identifiable audience needs.

It must also link outputs to outcomes through a research-based strategy with quantifiable measurement objectives (benchmarks) tested against baseline data obtained prior to the actual execution of the campaign (through secondary or primary research). Establishing baseline data also helps to identify any problems that might surface upon campaign execution.

Outputs. Outputs, as noted earlier, are the actual communication content to be used in the campaign. These are strategically positioned to be clear and transparent messages that are single-minded and address stake- and stockholder needs. They must be executed without error—they must be created with an understanding of audience expectations and norms, well written, and when required be well-designed graphically taking into account such things as color and image appropriateness and type style, format, and size. Further, outputs must be employed consistently across materials and audiences. Finally, any output should be consistent with other corporate functions and disciplines (e.g., marketing, advertising, promotion).

Outtakes. Outtakes are take-aways from third-party endorsers, specific target audiences, and research-based evaluation of such things as message awareness, understanding, tone, and share of voice. As Stacks and Michaelson (2009) point out, third-part endorsers would include influencers, reporters, important bloggers, and so forth. The outtake component indicates whether the campaign is on target and on phase in terms of establishing a clear differentiation between program objects (i.e., brand, corporate identification, credibility, confidence, relationships, reputation, trust) that is clear and communicates desired messaging and information.

Results. The business and communication goals are evaluated in the results components. Here objectives set as final outcomes are tested against baseline measures as a test of campaign success. In general the communication outcomes will center on business objectives dealing with measurable audience relationships with the company, impact on audience attitudes, beliefs, values, and intended behavior (to include actual behavior), and demonstrable return on investment in the communication campaign. Measured relationships should show changes in targeted audience awareness, knowledge, interest, or relevance of the campaign's intended product, image, reputation and so forth. Measured attitudes, beliefs, values, and behavior should demonstrate audience changes in company, product, or issue perception, willingness to recommend, willingness to purchase, willingness to change, and so forth. Demonstrable return on investment is based on quantified measurement of communication outcomes correlated with actual business outcomes—changes in sales, financial performance, perceptions of relationship or reputation, willingness to take action, and so forth.

Companies with the basic level components secured and in place (i.e., are following campaign best practices) should have teams in place that engaged and fully coordinated with their responsibilities and the campaign from developmental through evaluation campaign phases. This team engagement also includes bridging or liaison team members, who serve with corporate internal functions (e.g., marketing, HR, legal) and corporate external agencies who may handle specific concerns or problems beyond the scope of the corporate communications team. This can be measured through employee support across all campaign phases.

Level 2: Intermediate

Once the essential components have been satisfied the campaign may move to the second level—that of the intermediate level. Unlike the basic level, which is objectively measured, the intermediate level is more subjective and must be evaluated on some scalar measurement, one that includes a mid-point for uncertainty (Stacks, 2010; Stacks & Michaelson, 2011). As shown in Figure 6, the second level consists of three factors:

- Deep connections to target audiences;
- Global leadership support and engagement;
- Creativity and innovation that yields a unique approach to the problem, product, brand, or issue.

These three factors come into play during the developmental stage where there are buy-ins by the corporate management team and supportive commentary and criticism on the outputs to be put into place. Further, at this level overall campaign planning clearly involves business or corporate strategy with the communications function fully integrated into the larger corporate campaign. Indicators of exceptional factors are discussed below.

Deep Connections. All communication campaigns have as one of its goals the outcome of deeply connecting with target audiences. As noted earlier, one of the communication objectives in any campaign is to motivate audiences toward some attitudinal or behavioral action. The content that drives connections, that goes beyond the basic level outputs, strives to inspire target audiences by being memorable (if they do not remember it, the informational objective dealing with awareness has not been met), engaging, and have some unexpected content (visual, verbal, written). Engaging the target audience with relevant and motivating content should elicit psychological tension that the message either seeks to enhance and then

demonstrate how to deal with that tension or to create an aura of homophily (feelings that the product, brand, company, issue) is something audiences can identify with as being closer to them than other products, brands, companies, or issues (Michaelson & Stacks, 2011).

Campaigns that achieve an intermediate level of excellence build a bond between the campaign object and audiences.

Leadership. Campaigns that achieve an intermediate level of excellence are those which are supported by senior management and are aligned across the company, product, or brand's environment; they have internal support at the highest level. This puts the communication function at, as Grunig et al., argue at the "management table." Additionally, exceptional campaigns have communications taking a pivotal and central role in integrated communications planning; who else has the message strategy and mastery? Leadership support should then lead to engaged and enthusiastic team campaign support that builds on the essential teamwork required for campaign success.

Creativity. Since the communications function is responsible for the messaging strategy across the board, it makes sense that exceptional campaigns will be original in approach, inventive in distribution through the best communicational channels, and innovative and efficient in its execution. Creativity sets campaign planning apart from competing campaigns and often results in further enhancing the communications function's credibility within senior management.

Level 3: Advanced

At the highest level of excellence is the advanced campaign. This campaign will set the agenda for target audiences on key messages. It should be extended to a larger environment

through advocacy or word-of-mouth (WOM) and other diagonal, grapevine forms of message transmission—blogs, tweets, Facebook mentions, and so forth. This extension is critical in establishing a two-way symmetrical dialogue between company and target audience in a strategic long-term plan linked to company, product, brand, or issue goals. Advanced planning also demonstrates leadership not only in internal planning but also impacts on the corporate communications industry as well—it becomes the benchmark against which others establish degrees of excellence—that is, it is timeless in strategy, tactics, and demonstrable measured results that clearly show a connection to overall business goals and objectives.

### **Summary**

Measuring excellence is both an objective and subjective process. By process we mean that multiple measures must be made at various times across the campaign timeline, with multiple methods triangulated, and multiple analyses employed. As noted, at the basic level, either the attributes within the components are present or not and how the presence was determined. Hence, measurement is on a +/- or 1/0 nominal level. Intermediate and advanced level measurement is subjective and requires some form of scaling that is clearly interval in nature, that is it must run from no evidence of attribute through to evidence of exceptional execution of attribute. An ordinal measure, with no way to score the attribute as neither in evidence/nor not in evidence, is neither appropriate nor sufficient. In evaluating levels 2 and 3 planning, there is no “Don’t Know” or “Refuse to Answer.”

The question, then, is how do we evaluate campaign planning excellence? Perhaps as important is the question of how much weight we place on each level’s scoring in the overall evaluation of excellence. Weight of level is part and parcel of the planning process and should

be evaluated in all three phases of the communications campaign. Baseline assessment of the ability to carry out essential components from previous campaigns and some measure of team engagement is necessary. A baseline for content, leadership support, and creative vision also needs to be established setting benchmarks against which the baseline subjective analyses are made. Baseline data can be obtained through quantitative and qualitative methods and analyzed simple statistical analyses through sophisticated statistical modeling and created algorithms.

The weighting of each level should be set historically, against past campaign success. For some campaigns, where success has been limited or the problem or goal is new, weighting of the essential level may be high—perhaps 50%—of overall excellence. Where the communication function has performed well in the past, that weight may be reduced and the weight given to levels 2 and 3 increased.

### **Conclusion**

At present there is standard for evaluating campaign planning and programming. A standard, as Michaelson and Stacks noted is something used as a “measure, norm, or model in comparative evaluations (Michaelson & Stacks, 2011). As such, a standard for evaluating communications campaigns and their planning can be both internal and external contexts. What is needed is a metric or matrix from which to place obtained data, weigh and analyze the results, and demonstrate the measurable and quantified outcome against expectations and other “comparative” results. We propose that the model discussed in this paper serve as the initial attempt at establishing a common metric for evaluating communication campaign planning. It is a work in progress; over time we hope to establish reliable and valid measures

for both components and attributes that can be used across to assess communication planning and programming across industries, problems, and goal.

### **Conclusion**

What does it take to establish excellence in public relations or corporate communication campaign planning and programming? This paper suggests a generic model that provides a degree of standardization against which to compare that planning and programming. It can be used historically, to establish past campaigns. It can be used in the planning process to identify problems or holes in a campaign. Or, it can be used as a final evaluation that provides evidence based in quantifiable data weighted to the particular needs of the company or client at a particular point in time. Key here is the generic value the hierarchical model gives to the profession and function—a way to evaluate excellence and provide hard evidence, data, on that evaluation.

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