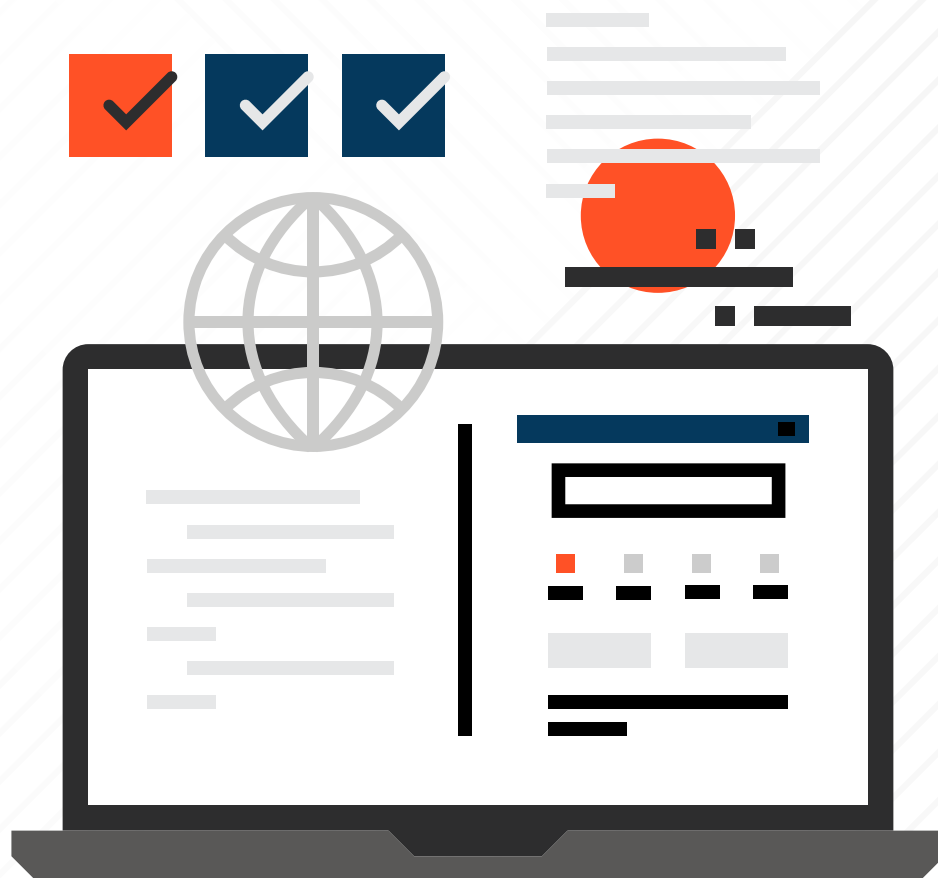
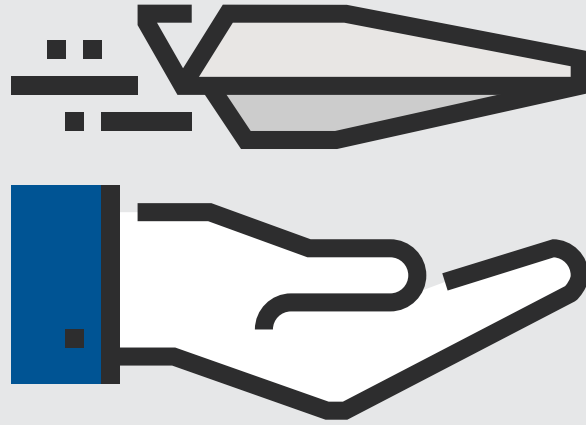


THE AMAZING, INCREDIBLE, INVINCIBLE

PR STRATEGY CHECKLIST

THAT WILL TURN YOU INTO A PR POWERHOUSE





HAS PR LOST ITS WAY?

Word on the street and in the boardroom is that, just maybe, it's outlasted its usefulness. That it simply doesn't provide the return on investment that other departments—like marketing—does.

And there's some truth to that (unfortunately). Decades of focusing on activities rather than impact—of PR teams crowing about vanity metrics and the number of journalists in their contacts—have seen PR budgets, departments and teams cut. In 2020 especially, PR looked expendable.

YIKES.

But despite this, the outlook isn't all bad.

THERE IS HOPE.

There are tools and strategies that can put this once mighty and honorable profession back in its rightful place... the executive boardroom.

This checklist is your map. Let it show you the way to becoming the PR powerhouse you know (and we know) you can be.

SHOW THEM THE WAY

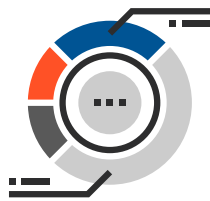
- ✓ PR is essential.
- ✓ It builds brands, it generates trust, and it even drives revenue.
- ✓ You know it. We know it.
- ✓ But unfortunately, not everyone else does.
- ✓ It's up to you to convince the doubters that PR matters—and that it has real business value.

WHERE TO BEGIN?

Being a successful modern communicator means embracing three equally important stages in the communications lifecycle:



Connecting with journalists and influencers to amplify your message



Capturing the reach of that message



Interpreting the data so you can learn, evolve and improve

CONNECT

Owned channels are awesome, but your message can only go so far on them. By connecting with reporters, broadcast journalists, bookers, producers, and social media influencers, you're giving your message a better chance at being amplified and distributed to a wider audience. When you identify the right influencers—those who have the ear and the heart of your ideal audience—and have them wax poetic about the genius of your company or client, you build credibility and authenticity with your audience.

CAPTURE

The work isn't done once your message is out there. Now's the time to collect the data! Only by monitoring the vast media landscape and tracking when, where, and to whom your message appeared, can you know if your efforts paid off. It's one thing to send out an email blast to a bunch of journalists; it's another thing entirely to be able to prove that those journalists took your pitch and ran with it.

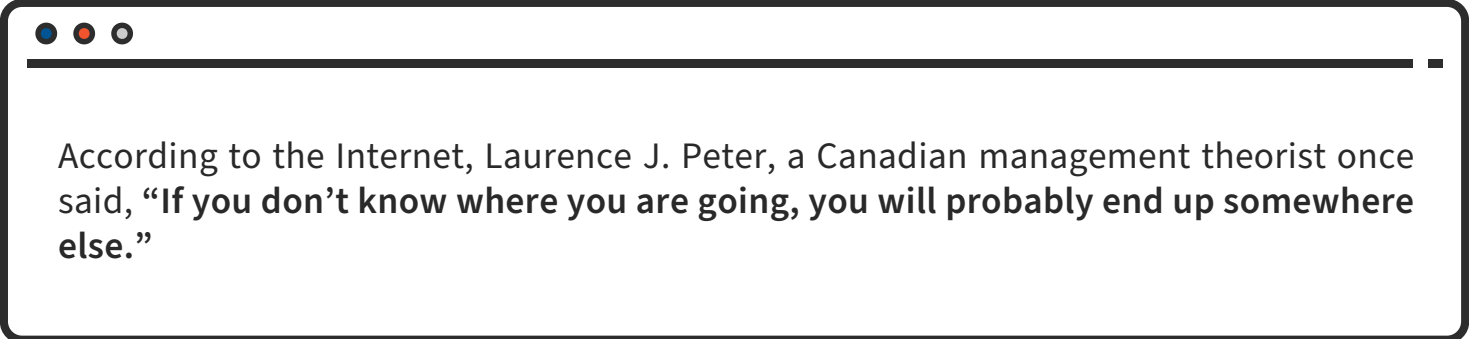
INTERPRET

You've got the data, now what? It's time to analyze the results and compare them to your previous benchmarks. If you aren't measuring in a meaningful way, you're not learning, which means you're not evolving or improving.

That's just part one. Part two is translating your results into C-suite language. You want the people holding the purse strings (your future) to understand your full prowess and the impact PR has had on their business goals.

Before we take a look at each of these three stages, there's a few things we should talk about. Like...

GOALS



According to the Internet, Laurence J. Peter, a Canadian management theorist once said, **“If you don't know where you are going, you will probably end up somewhere else.”**

Goals are like signposts or lighthouses or railway stations or bus stops or safe harbours or... well, you get the point.

Whether it's a big huge organizational goal, or the contained aim of a campaign, goals are capital “E” essential to PR and communications. Without them, you're lost, aimless, adrift, random.



LET'S START WITH THE BIG GOAL

What would your top executive say is the primary goal for the organization? What is that one thing that everyone under the umbrella is working toward? Write your answer in the box:

HOW CAN PR CONTRIBUTE TO THAT GOAL?

Let's say the big company goal is to grow shareholder value—how can you as a communicator help? Boost brand awareness? Discredit critics? Increase goodwill? Build a profile in new regions?

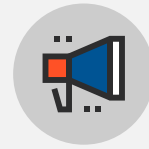
HERE'S AN
AWESOME FLOW
CHART WITH
EXAMPLES TO
HELP CONNECT
EVERYTHING



BUSINESS GOAL

What are key organizational goals?
What is important to the C-Suite?

- Increase revenue in market A by x%



PR OBJECTIVES

How can PR contribute to those goals?
Are there PR-related objectives?

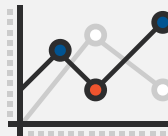
- Build awareness of products and services in the market
- Impact the sales funnel at awareness and consideration level



PR ACTIVITIES

What activities will you undertake to achieve your PR objectives?

- Generate positive press coverage for the company
- Generate PR buzz for the product
- Build relationships with journalists



PR METRICS

How can you measure if you have achieved your set objectives?

- Increase mentions
- Quality of coverage
- PR-driven website traffic from the region
- PR-driven leads – registrations, downloads
- Quality of your media relationships



PR IMPACT

How did you impact the business goal?

- Increased awareness by x%
- Increased engagement from target audience
- Generated PR-driven leads
- Created positive perception/reputation

NOW LET'S THINK ABOUT A SPECIFIC
CAMPAIGN YOU'LL SOON RUN.



WHAT'S THE GOAL FOR THAT CAMPAIGN?

The best thing to do here is to apply the SMART formula.

Specific. What specifically do you want to do?

Measurable. How will you know when you've reached it?

Attainable. Is it in your power to accomplish it?

Realistic. Can you realistically achieve it?

Timely. When exactly do you want to accomplish it?

Goals are about accountability, and the only way to know whether or not you've reached them is by having a method of measurement.

How will you know if you grew your brand awareness unless you quantify that goal in terms of meaningful metrics like website visits, social media mentions, and reach?

Here's an example of a SMART goal: *Increase our monthly Twitter mentions from 100 to 500 by the end of the fiscal year.*

Here's another example: *Increase our monthly appearances in top-tier broadcast outlets from 10 to 15 by the end of the third quarter.*

Your turn! After filling out the table above, write your campaign goal here:

TARGET AUDIENCE

Campaigns aimed at everyone and no one are pointless. To get results, you need to know exactly who you want to reach.

PR and comms people should take a cue from the B2B and B2C companies that painstakingly create buyer personas.

Just like them, you need to identify and understand your target audience.

The lists below will help inform your outreach strategy.

So, who are you going after?

DEMOGRAPHICS



FILL OUT ALL THAT APPLY

Age:

Location:

Gender:

Income:

Any other basic characteristics of a person's situation?

PSYCHOGRAPHICS

These are the finer details, what makes them *them*. Psychographics include anything that reveals what they're like as people. Are they Type A or Type B? What are their hobbies? Left-brained or right-brained? How do they relax? Do they relax? Write down who they really are.

Where and how do they consume their information? What do they read? What do they watch?

What are their current attitudes toward your company or client?

Knowing exactly whom you want to see your message will give your media outreach the tight focus it needs.

KNOW YOUR BASELINE

What kind of media coverage are you currently getting? How about your competitors? How's your web traffic? Social engagement?

If you don't know, you should.

Your baseline numbers are also inextricably linked to your goals. If you want to increase your mainstream media mentions by 15 percent in quarter four, you need to know how many media mentions you had in quarter three.

Before beginning a new campaign, take a baseline measurement of all the metrics that matter. That way, when your efforts result in some major spikes, you'll be able to show your boss the before and after. And better yet, you'll be able to identify your success, learn from it, and replicate it.

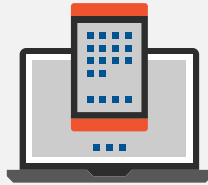
GET THE NUMBERS

Make friends with IT, sales, and marketing. You need access to important data from Google Analytics, CRM and marketing automation systems, social media monitoring tools, and business analytics platforms.

Average mentions per month:



PRINT: _____



ONLINE: _____



BROADCAST: _____



TWITTER

Total followers
Likes
Mentions
Retweets



INSTAGRAM

Total followers
Likes
Mentions
Comments



FACEBOOK

Total followers
Post reach
Post engagements



LINKEDIN

Total followers
Likes
Shares
Comments



TRAFFIC TO
YOUR WEBSITE
PER MONTH:



WE THINK BENCHMARKING IS SO IMPORTANT WE
WROTE A WHITEPAPER CALLED "MEDIA MONITORING,
BENCHMARKING, AND REACHING YOUR GOALS".

Those are the usual suspects, but if you have other significant social platforms, like YouTube, TikTok or Pinterest, make sure you record them here too:

Any other important baseline metrics?



WE HIGHLY RECOMMEND THAT AS PART OF YOUR PREP YOU CONDUCT A MEDIA COVERAGE AUDIT. LIKE, RIGHT NOW. AND CONVENIENTLY ENOUGH, WE DO THOSE! [LET'S CHAT.](#)

CONNECT

Imagine yourself standing at a microphone. You have big news to share. News that will change everything. Except, as you look out into a room that should be full of reporters, it's empty.

That's what public relations is like when you don't have a way to connect with your target audience through journalists and influencers.

The fact is, your content may be fantastic, but it's only as good as the number of eyes that see it and the number of minds that are changed by it.

Now imagine that you're at that same microphone and this time the room is full of reporters. But as you start to speak, everyone leans forward, hands cupped to their ears. Your mic is off!

That's what crafting and sending a stunning email pitch only to receive a bounce back is like.

Not only do you need a method to reach influencers, you need one that is reliable. Bad contact data is a killer and an out-of-date database is practically useless. Or maybe, *just maybe*, you don't even have a database.

There can be a lot of obstacles between you and the media contacts who will help amplify your message. The fastest way to get around those hurdles is research and a good media database.

Here's how to successfully connect with the right people:

1. IDENTIFY YOUR IDEAL JOURNALISTS AND INFLUENCERS

Just like with your target audience, you need to understand the journalists and influencers you want to reach. Who are they? What are their interests? What outlet do they work for? What are *their objectives*?

Don't fall into the trap of thinking that your ideal target has to have 3 million Instagram or Twitter followers, or only work at one of the biggest, most well-known media outlets. The one you choose needs to be the best person to reach your target audience. If that's someone at a regional newspaper or trade magazine, you may need to swallow your pride and do what's best for your audience.



Recommended read:

[Why research is a crucial ingredient in building your media list](#)

LET'S DO A QUICK EXERCISE

If you had your choice, who would you have screaming your story from the rooftops? Consider how often they write/speak, how they craft their communications, and who listens to them. Have an idea? List the characteristics of that ideal person:

A stylized illustration of a person in a blue shirt and white pants standing at a podium. To the right of the person is a large bracket with five red dots, each followed by a horizontal line for writing. The lines are light gray and extend across the width of the exercise area.



ONE BENEFIT OF PERFORMING A MEDIA MONITORING AUDIT IS TO FIND OUT WHO YOUR INDUSTRY INFLUENCERS ARE, AKA YOUR NEW BEST FRIENDS.

2. FIND THEM

You know who you want, now how to find them? You've got two options: buy a media database or build one yourself.

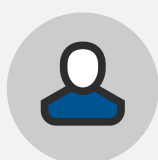
PROS OF SUBSCRIBING TO A MEDIA DATABASE

- ✓ Search and build lists easily
- ✓ Conduct outreach directly from the platform
- ✓ Track opens and clicks, making follow-up a breeze
- ✓ Relax knowing contact info is up to date

PROS OF BUILDING AND MAINTAINING YOUR OWN

- ✓ Cheap

ARE YOU LOOKING FOR A DATABASE VENDOR? MAKE SURE YOU ASK THEM THESE 10 QUESTIONS.



If your ideal influencer isn't a journalist, check to make sure that the database contains non-media contacts, like bloggers and social media influencers.

HOW DOES OUR DATABASE STACK UP AGAINST THE COMPETITION? FIND OUT.

3. HONE YOUR PITCH

Just like everybody else, journalists and influencers want to feel special—and mass pitches are the fastest way to let them know that they’re just another name on a list.



Recommended reads:

- [Secrets to pitching broadcast \(according to a former broadcast journalist\)](#)
- [6 strong pitching practices for B2B companies](#)
- [6 tips for establishing media relationships that will get you coverage](#)

4. FOLLOW UP

Does your database include email tracking? Does it tell you who opened your pitch, when, and which links they clicked? If not, you should get a database that does those things. Follow-up will be so much easier.

CAPTURE

At some point in time, you’ve probably wished you could predict the future. While this would be a pretty awesome skill for PR powerhouses to have, at least for now, we continue to rely on more mundane methods of forecasting.

Like hyperacusis... *What?*

HY·PER·ACU·SIS

[,hī-pə-rə-ˈk(y)ü-səs] Noun

is exceptionally acute hearing, which includes listening intently and listening widely. Tracking the entire landscape for sounds and rustlings that can affect you.

When you monitor the media, you learn who is saying what about you, your industry, and your competitors. And when you have an ear to the ground and a finger on the pulse, it’s like having an advanced warning system for potential crises or threats—and opportunities. In order to stay in front of crises and take the greatest advantage of opportunities, you need to listen properly. It takes a good tool, but it also takes good practices.

KEYWORDS

The right keywords are the foundation of any monitoring program. If your keywords don't bring in what you're looking for, you won't have success—it's that simple.



BUILD A KEYWORD SPREADSHEET

Having them laid out will reduce the chances that you miss a relevant term, spokesperson, product, or competitor. And watch out for common misspellings—in this case, typos can be a good thing.

Here's an example:

KEYWORD	INCLUSIONS	EXCLUSIONS	COMMON MISSPELLINGS
muffins	muffins AND donuts	NOT "English muffins"	muffn, moffin

4 STEPS FOR CHOOSING THE RIGHT KEYWORDS

1. BE SPECIFIC

Broad is bad. Narrow in on precise terms—including any unique ones your competitors use—to make sure you don't flood your program with irrelevant results.

2. ACCOUNT FOR VARIED SPELLINGS

When monitoring broadcast, speech-to-text transcription can get messy—meaning, if you don't include phonetic spellings, you're sure to miss relevant hits. Same goes for social monitoring, where there can be as many spelling variations as there are spellers.

3. INSPECT YOUR SELECTION

Double-check to make sure each and every important keyword appears in your spreadsheet, and is correct (and incorrect, because typos). And get others to chime in!

4. SET REVIEW REMINDERS

Monitoring is not a set-it-and-forget-it service. Review all keywords at regular intervals throughout the monitoring period, especially if the project spans multiple months or years.



GEOGRAPHY MATTERS

Create a list of regions to monitor. Cast a wide, but not insanely wide, net.

It's better to cut some regions when they return no coverage than to miss out on some juicy mentions.



REGIONS

Defining a geographic area is necessary when gathering traditional media coverage. Failure to do so can and will result in you getting too much irrelevant coverage—aka “noise”—from regions that aren’t important to you.

Where do we operate?

Where do we hope to expand?

Where do our competitors operate?

Where does industry coverage originate?

Online and social media mentions are a little different. Coverage on those platforms doesn’t depend on location and can be consumed by anyone anywhere. Definitely include your competitors' handles in your social media scouring.

BOOLEAN

This one’s big. Without getting too bogged down in the nitty-gritty, Boolean searching allows you to combine keywords with operators such as AND, NOT, and OR. This way your search filters unwanted coverage, which means more relevant mentions.

BOOLEAN SEARCHING FOR BETTER RESULTS



AND combines words and phrases. When using this, a search will only return results that include both A and B.

OR adds words or phrases independent of each other. This allows two or more keywords to be searched independently and will display results for any of the searched keywords. This is the most common operator in more complicated search strings.

NOT excludes a word or a phrase. When used in conjunction with other operators, you can exclude a specific keyword that commonly shows up among other results.

QUOTATION MARKS combine two or more words into a single phrase. When enclosed in quotes, a phrase will be treated like a single word within a search.

QUOTATION MARKS = QUOTATION MARKS
"QUOTATION MARKS" = QUOTATION MARKS

PARENTHESES are used to group similar keywords. In search strings they're often used to group together the OR and NOT keywords. They can also be used to combine OR with AND keywords, ensuring they stay separated from the NOT keywords.

(KEYWORD OR KEYWORD) AND ("KEYWORD" OR KEYWORD)

NOW YOU GIVE IT A SHOT.

Use the nifty chart below to experiment with refining your search terms. Quick tip: Start with the terms you know you'll need, then add your dependent keywords to fine-tune your searches. And try to save the exclusions for the end of your process.

[illegible]

A WORD ABOUT CONTENT LICENSES...

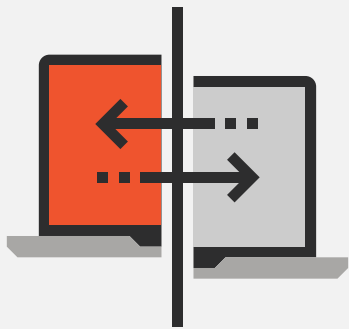
If you choose to do your own monitoring and imagine you might want to access and share the articles you're mentioned in, you need to make sure you don't run afoul of the law.

A lot of content is under copyright protection by major providers. In some cases, you can't share more than 30 words of a given article, even for internal use, meaning no copy-and-pasting, no scanning, and no emailing. In order to share it, you need the author's or the outlet's permission. This comes in the form of a license.

Do your homework and figure out which regions you'll be monitoring and what media types or specific publications you'll be focusing on. From that, you'll learn which licenses you'll need.

On the other hand, if you choose to have a firm do your monitoring, any company worth its salt will have relationships with these content providers and can work with you to come up with a solution that matches your needs and your budget.

Your choice.



DIY VS. MANAGED

Now the million-dollar question: do you go with an automated monitoring tool or have a people-powered team gather your media mentions and create news briefs?

In other words, do you want to do it yourself (with the help of some great media monitoring software) or have someone do it for you?



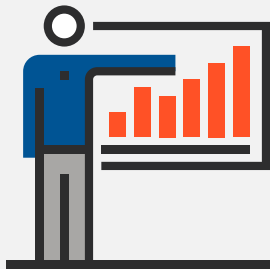
IF YOU'RE STILL NOT SOLD ON MEDIA MONITORING, CHECK OUT [MEDIA MONITORING: THE ULTIMATE GUIDE.](#)

If you're working for a large organization that generates a lot of media coverage, or has complex monitoring needs, a managed media monitoring service will likely be the best fit.

INTERPRET

You can have all the numbers you want, all the stats and all the charts. But unless you dig into them—unless you strive to understand—you're not doing all you can to evolve as a communicator and become a PR powerhouse.

The crux of it is this: you need to look at your data, you need to understand the why of it—why do we appear in that story? Why does this journalist keep covering us? Why are our social mentions skyrocketing? You need to measure results so you can quantify your successful (and not-so-successful) activities.



Only with results in hand can you prove your impact on the organization and get better as a communicator, to then make a bigger impact, and get even better, and then make even more of an impact... and then, well you know.

It's a beautiful cycle.

In other (and fewer) words, you need to interpret your data. Your data won't mean anything to anyone until you make it mean something to you first. It won't be easy, but you can't prove PR impact without it.

WHICH METRICS MATTER TO YOU AND YOUR GOAL?



INTERPRETATION STARTS WITH METRICS

Take a quick peek back at page 9 and 10 and the benchmarks you've established. Once you've refreshed yourself on your goal, ✓ the metrics you need to measure in order to know how close (or far) you are from it. Go on, we'll wait.

TRADITIONAL AND ONLINE METRICS: DATABASE

- Coverage trend (week over week, month over month, quarter over quarter, etc.)
- Coverage tone
- Share of voice (SOV)
- Article type
- Publication type
- Top authors
- Top publications
- Top regions
- Top quotes
- Prominence
- Top spokespeople
- Coverage benchmark
 - Circulation/reach over time
 - Total circulation/reach
 - Competitive sentiment (ie. sentiment by competitor)
 - Top stories (by No. of outlets or by circulation)

SOCIAL METRICS:

- Mentions/coverage trend over time
- Coverage trend by hour
- Total mentions/total reach
- Mentions by region
- Top hashtags
- Top words
- Top web links
- Top favorited content
- Top retweeted content
- Top influencer by retweets
- Top influencer by posts
- Top influencer by followers
- Sentiment/tone
- Platform SOV
- Facebook likes
- Facebook shares
- Facebook comments
- Instagram interactions
- Instagram likes
- Instagram comments
- Influencer score
- YouTube views
- YouTube subscribers



YOU MIGHT NOTICE WE LEFT ADVERTISING VALUE EQUIVALENCY OFF THE LIST BECAUSE THE WORLD SEEMS TO BE GOING IN A DIFFERENT DIRECTION. IN FACT, THE 2020 UPDATE OF THE BARCELONA PRINCIPLES CLEARLY STATES THAT AVEs ARE NOT THE VALUE OF COMMUNICATIONS.



QUALITY VS. QUANTITY

The path to PR success has changed. Earning your company or client media coverage is good, but it’s not enough to just count that mention and move on. Measuring quantity is one thing, but what really matters is digging into that coverage and seeing if it’s the kind of stuff that can contribute to big organizational goals.

WHERE PR CAN
REALLY
DEMONSTRATE
ITS WORTH IS
BY PROVING
IMPACT
RATHER THAN
JUST OUTPUT.

If you want a better way to measure or quantify PR efforts, setting up a **media quality scoring system** is a must.

When designing your own unique measurement framework, you have to consider what needs to be present in a piece of earned media for it to have a positive impact on your target audience. Likewise, what undesirable elements would lead to a negative impact? The presence or absence of each element earns the addition or subtraction of points for that article or broadcast clip, resulting in a definitive score for each.

Here’s an example of a quality measurement framework:

ELEMENT	IF YES	IF NO
Published in a top-tier media outlet	1.5	0.5
Published online	1	0.5
Contains desirable visual	1	0.5
Is factually accurate	0	-1
Spokesperson quoted	0.5	0
Contains CTA	1	0
Aligns with strategic goals/key messages	1	0.5
Third-party advocacy	1	0
Reinforces negative message	-1.5	0

If you like what you see, go ahead and use it yourself. Or you can always build your own based on what’s uniquely important to you and your goals.

ELEMENT	IF YES	IF NO

EVALUATE AND EVOLVE

Once you institute a media quality scoring framework, each piece of precious earned media will have a score attached to it. This is where true interpretation comes in.

“This month we had an average media quality score of 8.5, while last month’s average was 7.1. Way to go, PR! Whatever you’re doing, keep it up!”

But what are you doing?



FOR EACH CAMPAIGN, LIST YOUR GOAL(S), YOUR RESULT(S), AND WHY YOU SUCCEEDED OR DIDN'T. YOU HAVE TO LEARN FROM THE PAST IF YOU WANT TO IMPROVE IN THE FUTURE.

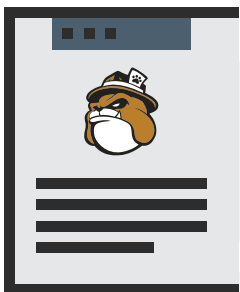


There's a lot more we could say about meaningful measurement. We'll save it for now and instead point you in the direction of the free webinar ["Measuring Impact: How to Connect PR Outcomes to Business Objectives"](#), led by Pragya Dubey, Senior Director of Global Services at Agility PR Solutions.



YOU'RE READY!

Thanks for reading all the way to the end. We hope you found this useful. If you did, remember *The Amazing, Incredible, Invincible PR Strategy Checklist* is designed to be used again and again. Print it out whenever you start a new campaign, follow the checklist, and watch your powers grow.



And before you go, be sure to [subscribe to Bulldog Reporter](#) so you'll be the first to get the latest PR insights, resources, and webinars.

Or if you'd like to learn more about any of our services, you can book a [free demo](#).

