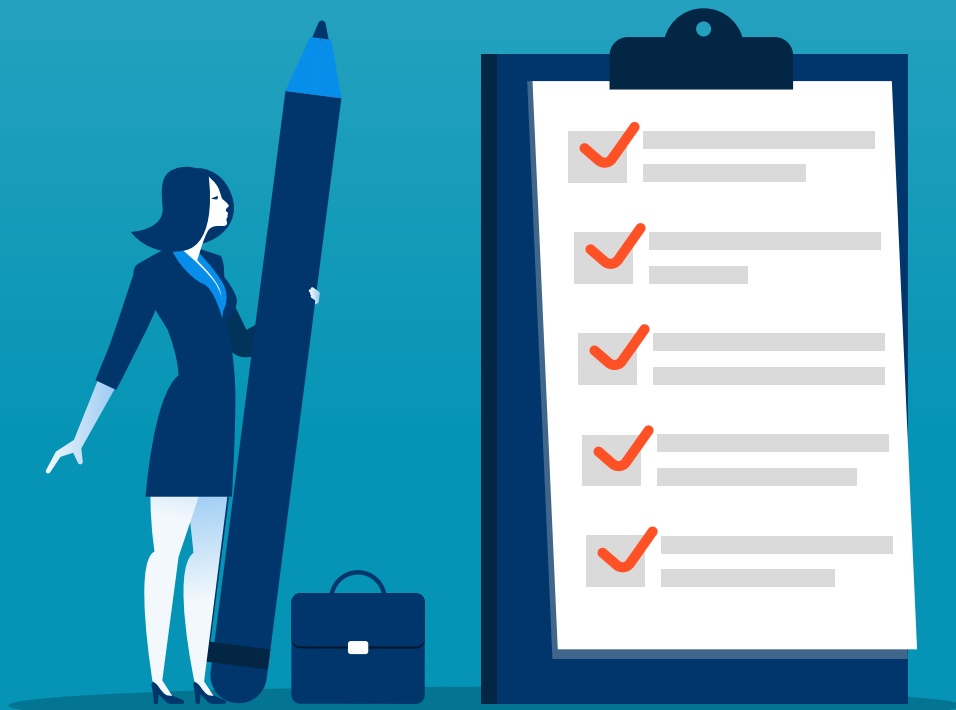


The Amazing,  
Incredible, Invincible  
PR Strategy  
Checklist

*That will get you from  
PR pro to PR superhero*



# Has PR lost its way?

Word on the street and in the boardroom is that, juuuust maybe, it's outlasted its usefulness, that it simply doesn't provide the return that other departments like — oh, I don't know — marketing does.

And there's some truth to that. Decades of focusing on *activities* rather than *outcomes* — of PR teams crowing about vanity metrics and the number of journalists in their Rolodexes — have seen their clout and their budgets decrease.

But the outlook isn't all bad.

## *There is hope.*

There are tools that can put this once mighty and honorable profession back in its rightful place in the executive boardroom. There are ways for you to grow into the PR superhero you know you can be.

As Superman's father once told his son, "*PR pros can be a great people, Kal-El, they wish to be. They only lack the light to show the way.*"

**This checklist will be the light. Let it show you the way.**

# There is a better way.

PR is essential.

You know it. We know it.

It builds brands, it generates trust, and, believe it or not, it drives revenue.

But unfortunately, not everyone is convinced.

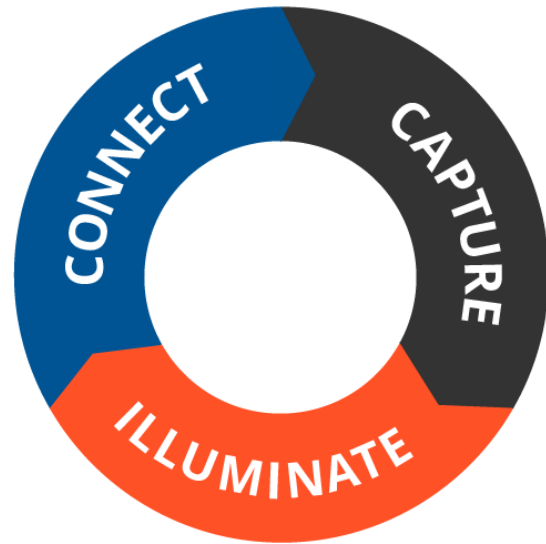
Your mission, should you choose to accept it (you should), is to prove PR's worth.



*It's time to get into that phone booth and slip into something more superhero.*

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

- **Connecting** with influencers who can and will amplify your message
- **Capturing** the reach of that message
- **Illuminating** the data so you can learn and evolve



## CONNECT

By connecting with journalists and social media specialists, you're giving yourself the best chance to increase your message's distribution and amplification. And by identifying the right influencers — those who have the ear and the heart of your ideal audience — and having *them* wax poetic about the genius of your company or client, the heavy lifting falls off your shoulders.



## CAPTURE

By monitoring the vast media landscape and tracking when, where, and in front of whom your message is appearing, you give yourself the knowledge of how your efforts are paying 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.



## ILLUMINATE

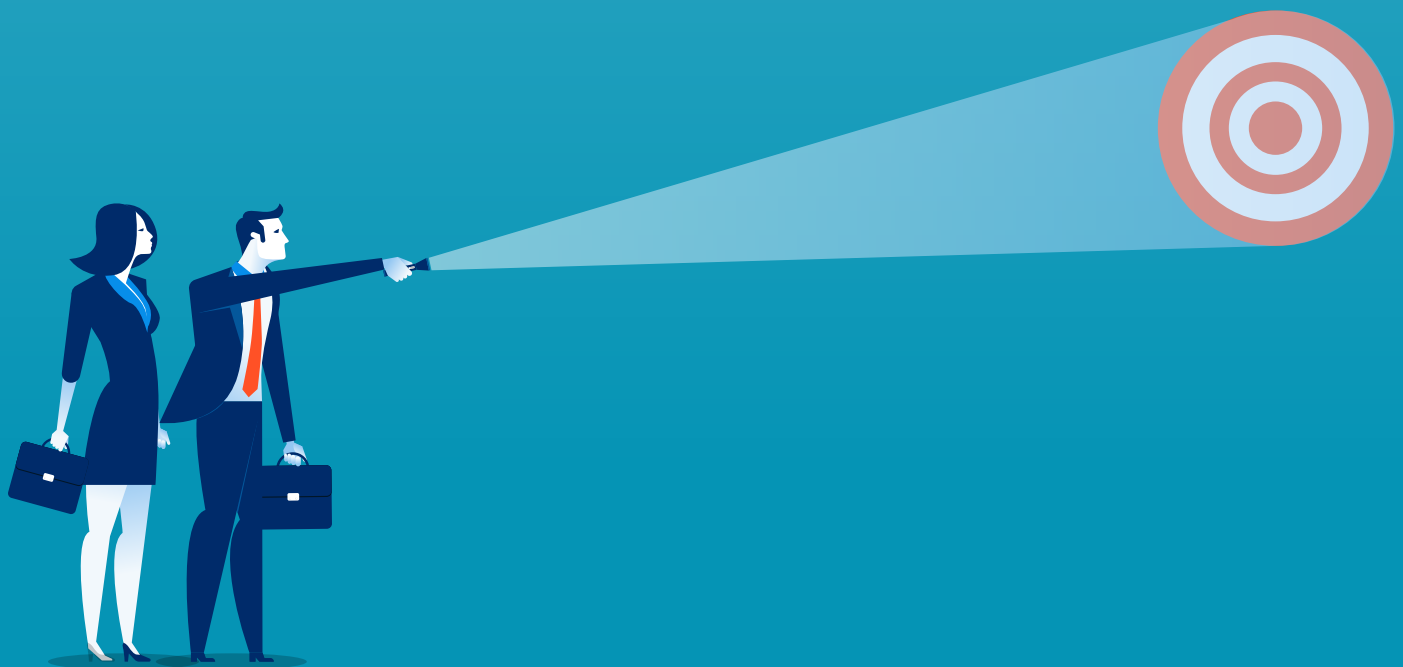
By measuring your data, by analyzing your results and comparing them to past periods, you shine a very bright light on your PR activities...and more importantly, their outcomes. This is where you separate yourself from the PR weaklings and establish yourself as an industry leader. If you aren't measuring, if you aren't keeping track of your contributions to measurable business objectives, you're not evolving.

# Got Goals?

**W**hat's that saying? If you don't know where you're going, you'll never know when you get there.

Whether it's a big huge organizational objective, or the contained aim of a contained campaign, goals are essential when it comes to PR and communications. Capital "E" essential. Without 'em, you're just floating along.

So let's talk about them.



**LET'S START WITH THE BIG GOAL.** What would your top executive say is the key goal for the organization? What is that one thing that everyone under the umbrella is working toward?

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**And how can PR contribute to that goal?**

eg. If it's growing shareholder value – how can you help? Grow brand awareness? Discredit critics? Increase goodwill? Build profile in new regions?

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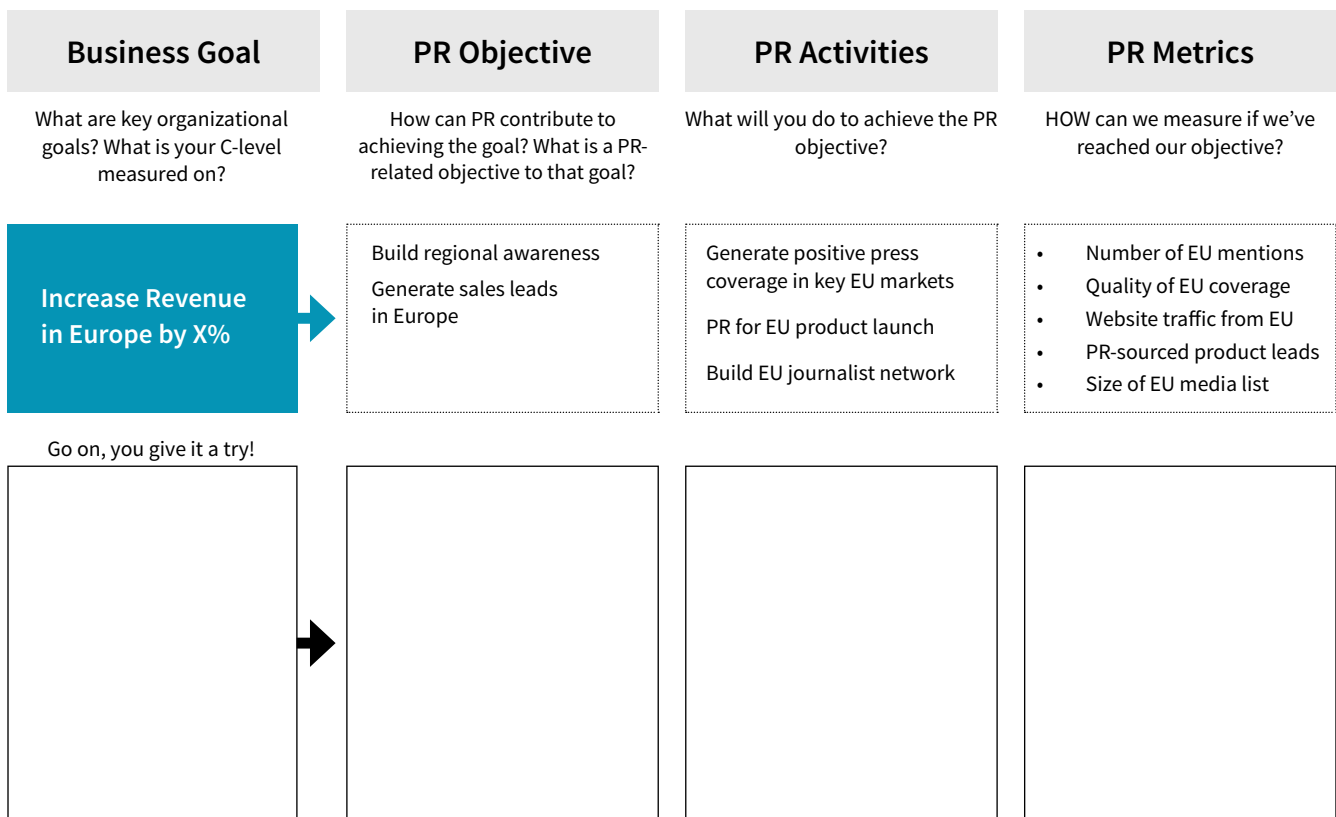


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Here's a cute little flow chart to help connect everything.



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.

S	<b>Specific.</b> What specifically do you want to do?	
M	<b>Measurable.</b> How will you know when you've reached it?	
A	<b>Attainable.</b> Is it in your power to accomplish it?	
R	<b>Realistic.</b> Can you realistically achieve it?	
T	<b>Timely.</b> When exactly do you want to accomplish it?	

Goals are about accountability. And reaching them for each and every campaign depends entirely on being able to measure against them.

How will you know if you grew your brand awareness unless you quantify that goal in terms of website visits? Or Twitter mentions?

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

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

Now those are nice goals. SMART too!

After filling out the table above, write your campaign goal down here:

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# Target Audience

**G**one are the days of willy-nilly campaigns aimed at everyone and no one. To get results, your focus needs to be laser...ahem...focused.

Just as B2B and B2C companies create their buyer personas, so too do PR and comms people need to identify their target audience.

Filling out the lists below will inform your outreach strategy.

So, who you going after?





**DEMOGRAPHICS:**

Fill out all that apply.

Age: \_\_\_\_\_ Gender: \_\_\_\_\_

Location: \_\_\_\_\_ Income: \_\_\_\_\_

Any other basic characteristics of a person's situation?

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**PSYCHOGRAPHICS:**

These are the finer details, and get us into the heads of your audience. Psychographics include anything that reveal 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.

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

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What are their current attitudes toward your company or client?

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Once you know whom you want seeing your message, it'll give your media outreach a tight focus.

# Hitting from the baseline

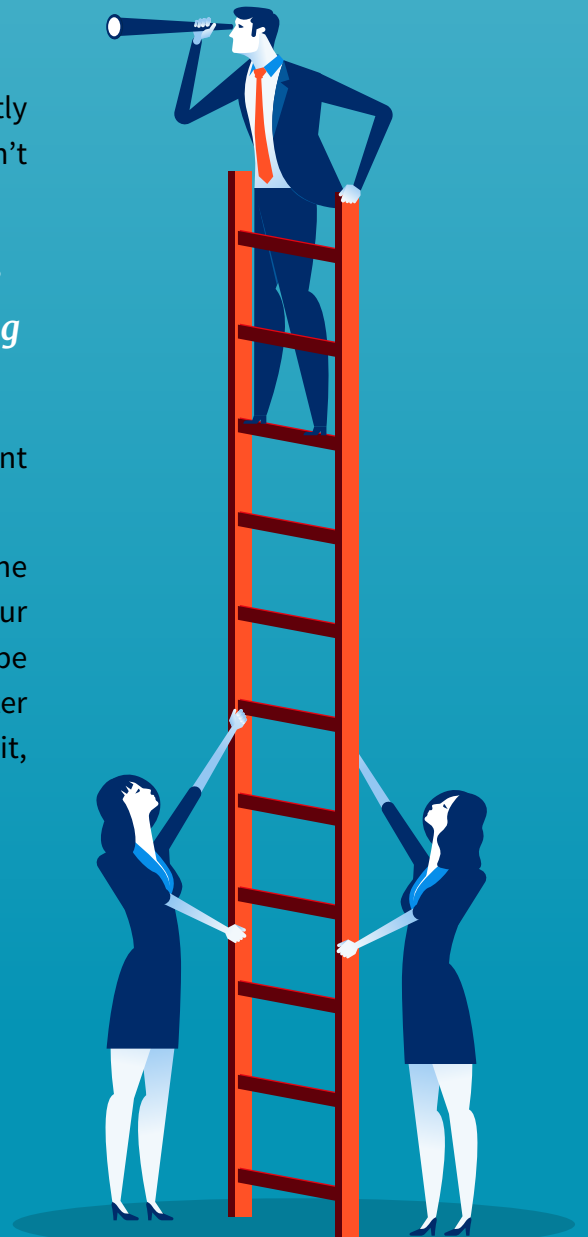
(It's a tennis term...)

**W**hat kind of media coverage are you currently getting? How about your competitors? If you don't know, you need to know.

*“There is only one thing in the world worse than being talked about, and that is not being talked about.”* — Oscar Wilde

Likewise, what kind of web traffic and social engagement are you getting?

Before every campaign, you need to take a baseline measurement of these things. That way, when your superhero 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 *ad infinitum*.



**FIRST SUPERPOWER YOU’RE GOING TO NEED TO DEVELOP IS A NEAT LITTLE THING CALLED IRRESISTIBLE SWAY.**

Make friends with IT, Sales operations, Marketing operations...bribe them with tech gadgets, ironic T-shirts, Archer DVDs...do what you must to get access to important data from Google Analytics, CRM and marketing automation systems, social media monitoring tools, and business analytics platforms.

**NUMBER OF MENTIONS PER MONTH:**

Print: \_\_\_\_\_ Online: \_\_\_\_\_ Broadcast: \_\_\_\_\_

Traffic to your website per month: \_\_\_\_\_

**LAST MONTH’S SOCIAL MEDIA STATS:**

**TWITTER**

Total followers \_\_\_\_\_

Likes \_\_\_\_\_

Mentions \_\_\_\_\_

Retweets \_\_\_\_\_

**INSTAGRAM**

Total followers \_\_\_\_\_

Likes \_\_\_\_\_

Mentions \_\_\_\_\_

Comments \_\_\_\_\_

**FACEBOOK**

Total page likes \_\_\_\_\_

Post reach \_\_\_\_\_

Post engagements \_\_\_\_\_

**LINKEDIN**

Total followers \_\_\_\_\_

Likes \_\_\_\_\_

Shares \_\_\_\_\_

Comments \_\_\_\_\_

This presentation from the mighty and magical **Serena Ehrlich**, director of social and evolving media at Business Wire, tells you all you need to know about **the importance of using monitoring to know your baselines.**

**WEBINAR**

**SLIDESHARE**

**Any other social media platforms?**

_____	_____
_____	_____
_____	_____
_____	_____

**Any other baseline metrics matter to you?**

_____	_____
_____	_____
_____	_____
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Your baseline numbers are also inextricably linked to your goals. If you want to increase your mainstream media mentions (alliteration!) by 15 percent, you need to know how many you've got in the first place.

We HIGHLY recommend you conduct a media coverage audit at the outset. Like, right now.

In fact — wouldn't ya know it — we do those!

**LET'S CHAT**

# Connect

## ...faster than a speeding bullet

The next ability you so desperately need to become a PR superhero is **enchantment**, aka the power to reach those influencers and charm them into doing your PR bidding.

Because the fact is, your campaign copy and your company content may be 100% wow fantastic, but it's only as good as the number of eyes that see it and the number of minds that get changed. And that's why you need third-party influencers to spread your message.

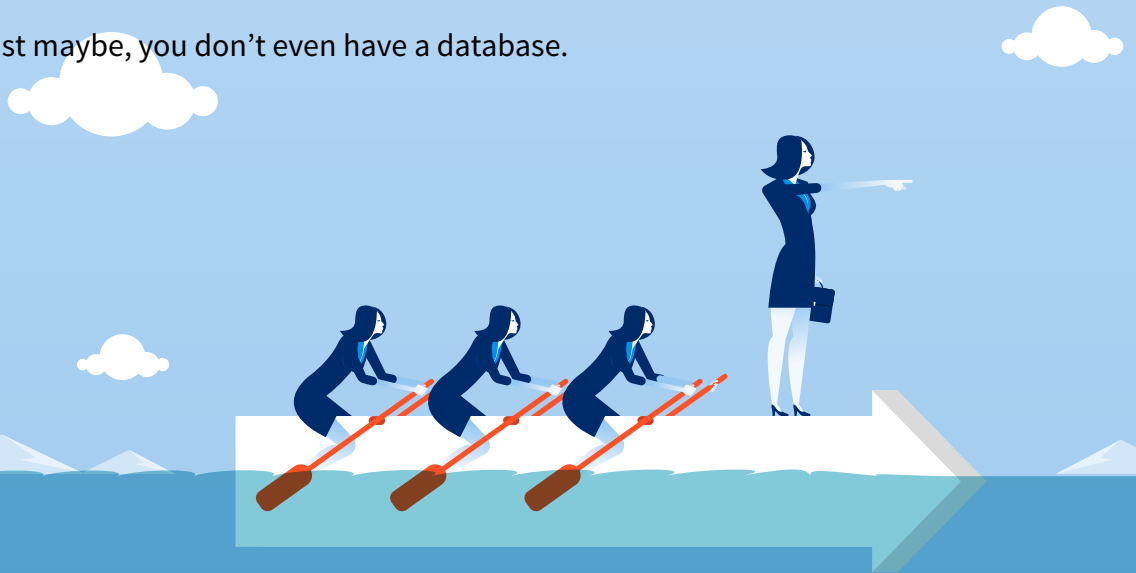
How many times has this happened to you?

You craft a stunning email pitch to your dream influencer, the one who will open up all types of avenues to mind share, only to have the evil Dr. Bounceback pop up in your inbox.

Bad contact data is a killer, and the database you started using in college has out-of-date contact info lurking everywhere.

Sometimes it doesn't even have contact info.

Or maybe, just maybe, you don't even have a database.



### enchantment

[en-**chant**-muh nt]

noun

the art, act, or an instance of charming another in order to achieve one's own aims

**THE OBSTACLES TO CONNECTING TO THE RIGHT INFLUENCERS AND AMPLIFYING YOUR MESSAGE TO THE RIGHT AUDIENCE ARE MANY.**

Here’s how to successfully connect to the right people, and put that enchantment to use.

**1. Identify your ideal influencers**

Same as your target audience — you need to get in the head of the people you want to tell your story. Who are they? What outlet do they work for? What are *their objectives*?

Are they journalists at top-tier outlets? Do they have 3 million Twitter followers? Maybe it’s the editor of that small-town magazine on hang gliding. **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. Now list the characteristics of that ideal influencer.




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One reason to perform a [media monitoring audit](#) is that it’ll show you who your industry or product influencers are, *aka* your new best friends.

## 2. Find them

You know what you want, now how do you find 'em? You've got two options: buy or build yourself.

### A) SUBSCRIBE TO A MEDIA DATABASE

**Pros:**

- Can easily search and build lists
- Regular maintenance ensures contact info is up to date
- Ability to conduct outreach directly from the platform
- Can track opens and clicks, making follow-up a real breeze

### B) BUILD & MAINTAIN YOUR OWN

**Pros:**

- Cheap

[See how our database stacks up against the competition](#)

## 3. Hone your pitch

Just like everybody else, influencers like to feel special — and blast pitches are a bulletproof way to make them feel not special.

Read: [7 ways to develop your media pitch](#)

## 4. Follow up

Does your database include email tracking? Does it tell you who opened your pitch, when, and on which links they clicked?

Get a database that does these things; it'll make your follow-up so much easier.

### READ ALL ABOUT IT:

[7 ways to destroy all credibility as a PR practitioner](#)

[Calling a journalist? Don't be annoying](#)

[Media Matchmaker](#)

### Bonus resource:

[Choosing a database vendor? 10 questions to ask first](#)

# Capture

...more than just villains

The problem that we mortals encounter when it comes to predicting the future (besides not actually having clairvoyance) is that we don't pay enough attention to the present.

The next PR power to hone? **Hyperacusis** (which is a fancy superhero word for really good hearing).

Hyperacusis is about listening intently, sure, but it's also about 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, of course.

**In order to stay in front of potential crises and take the greatest advantage of potential opportunities, you need to listen properly.** It takes a good tool, but it also takes good practices. Here are some tips on how to turn up the volume.

## Hyperacusis

[hī'pər-ə-kōō'sīs]

noun

exceptionally acute hearing, resulting in the collection of sounds, noises, rustlings, and murmurs, regardless of the volume of their emittance





## KEYWORDS

The right keywords are the foundation of any monitoring program. If your keywords are shoddy or 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 for typos. Here's an example.

Keyword	Inclusions	Excusions	Common Misspellings
Muffins	muffins AND doughnuts	NOT "english muffins"	muffn, moffin

## 4 SUPER KEYWORD TIPS

### 1. Be specific

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

### 2. Account for varied spellings (*aka* don't watch for typos)

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 as spellers. And know your competitors' handles.

### 3. Review, Review, Review

And get others to chime in! Double-check to make sure each and every important keyword appears in your spreadsheet, and appears correctly — ya know, watch for typos.

### 4. And 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.

## REGIONS

Defining a geographic area is necessary when gathering traditional media. Failure to do so can and will result in you getting too much irrelevant coverage — what we in the biz so cleverly call “noise” — from regions that just don’t matter to you.

### Geography matters

Create a list of regions to monitor. Cast a wide, but not insanely wide, net — better to cut some regions when they return no coverage than to miss out on some juicy mentions.

Where do we operate?	Where do we hope to expand?	Where do our competitors operate?	Where does industry coverage originate?
<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>

*Online and social media mentions obviously are a little different here, as coverage on those platforms doesn’t depend on location, and can be consumed by anyone anywhere.*

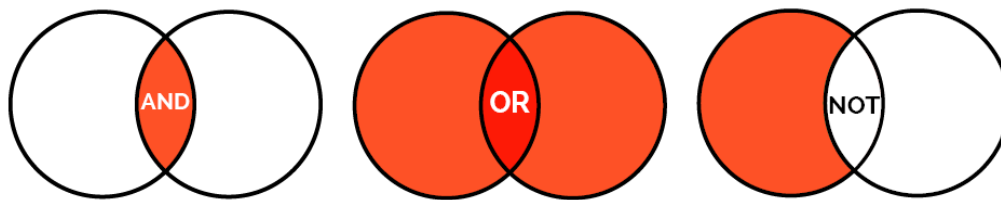
**Bonus resource:**  
[DIY: Media monitoring by region](#)

## 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 refinement of your search filters unwanted coverage, which means more relevant mentions. Yippee!

Maestro, show 'em how it works.



**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** = QUOTATION MARKS

“**QUOTATION MARKS**” = QUOTATION MARKS

**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.



## A WORD ABOUT CONTENT LICENSES...

If you choose to do your own monitoring, and imagine you might want to access and share the articles wherein you're mentioned, you need to make sure you don't run afoul of the law (this is key to staying on the right side of the superhero-supervillain divide).

Lots and lots 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 emailing. In order to share it, you need their permission. This comes in the form of a license.

So do your homework and figure out what regions you'll be monitoring and what media types or specific publications you'll be focusing on. This'll tell you 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?

- ME ME ME!**
- Someone else, please**

### **Bonus resource:**

[\*Choosing media monitoring software? 6 questions to ask first\*](#)

# Illuminate

## ...your PR powers

**Y**ou can have alllll the numbers you want, all the stats and all the charts. But unless you dig into them — unless you strive to understand them like Wonder Woman strives to fight for those who can't fight for themselves — you're not doing all you can to evolve as a communicator and become a PR superhero.

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? — and you need to measure results so you can quantify your successful (and not-so-successful) activities, and prove your impact on the organization, get better as a communicator, and then have a bigger impact, and get even better, and then make even more of an impact. It's really a beautiful cycle.

In other (and fewer) words, you need to illuminate your data.

Doing so will give you the final missing power in your PR arsenal: **intelligence infinitum**.

With infinite insight, you can finally prove PR's impact. But it won't be easy.

### intelligence infinitum

[in-tel-i-juh ns in-fuh-nahy-tuh m]

noun

the manifestation of bizarrely high levels of knowledge, such that will aid in the superior execution of any and all tasks



## ILLUMINATION STARTS WITH METRICS

Which metrics matter to you and your mission? Take a quick peek back at your goal and benchmarks you've established, and come back and ✓ the metrics you need to measure in order know how close (or far) you are to that goal. Go on, we'll be here waiting.

### Traditional and Online Metrics:

- Coverage Trend (week over week, month over month, quarter over quarter, etc.)
- Coverage Tone
- Share of Voice
- Article Type
- Publication Type
- Top Authors
- Top Publications
- Top Regions
- Top Quotes
- Prominence
- Coverage Benchmark
  - Circulation/reach over time
  - Total circulation/reach
  - Competitive sentiment (ie. sentiment by competitor)
  - Top stories (by No. of outlets or by circulation)
- Prominence
- Top Spokespeople

### 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

And, by all means, track and measure ad value equivalency...if that's really what you want. But *the world seems to be going a different direction.*

## QUALITY VS. QUANTITY

The path to PR success has changed. Earning your brand some media coverage is good — in fact, bravo! — 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 objectives.

*You're going to make a difference. A lot of times it won't be huge, it won't be visible even. So shine a light on it and illuminate what you've done.*

- Commissioner James Gordon

(He never actually said that last part — we're working with what we got here, people.)

Where PR can really demonstrate its worth is by proving **impact** rather than just **output**, and you do that by securing quality coverage, coverage that will help achieve overall business objectives.

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 take into account what you think would need 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.

### **Bonus resource:**

*[The data revolution has arrived](#)*



Here’s an example of a handy 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



**BYE BYE!**

Thanks for reading all the way to the end! Congrats! We hope beyond hope you found this all 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, watch your powers grow, and around and around we go.

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

**DON'T BE A STRANGER**

We've just come through so much together, let's make it official. Give us a follow!



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