

There are five glaring misconceptions about how to think strategically, particularly where communication is involved. Here, Fraser Likely explains those misconceptions, starting with why a strategy is not the same thing as a plan, and concluding with why a communication planning template shouldn't include a section for "communication strategy."

What it takes to be a communication strategist

How to link communications to business strategy

by Fraser Likely

The evidence is mounting. It's no longer enough to be a good manager or even a great leader to hold a senior position – senior PR/Communication practitioners and consultants must be legitimate, tried-and-true strategists.

For example, headhunters talk about both consulting firms and in-house PR/Communication departments increasing their complement of senior people. They point to junior staff and mid-management types being let go to find budgetary room for these additions. The desire is to increase strategic capacity, the number of good strategists. Recruiters also complain about how difficult it is to find truly "strategic" senior managers for these positions, that our pool of strategy experts is rather shallow.

My own experience as a PR/Communication management consultant is similar. I recently completed a benchmarking study of 28 communication departments. The trend is to enlarge the senior management team, recruit people with graduate degrees (in law; political

science; public relations; international relations; as well as the trusty MBA) and train, decrease the number of junior "tactical" staff and provide an account team led by a senior strategist to each internal client. It's these internal clients – business line and central staff function senior executives – who are demanding a better strategist. Heads of these communication departments grumble about the recruiting effort needed to separate the wheat from the experienced-but-not-really-strategic chaff. They acknowledge it's a seller's market: a sound, seasoned, senior strategist can command above market value.

While the PR/communication industry has talked about the need to be strategic, it's still apparent that collective understanding of concepts like strategy or strategic management is limited. There are some interesting misconceptions as well. In this article, I will address five. The five that, in my 15 years advising heads of communication departments on organization, performance and strategy development, are the most prevalent.

Five misconceptions of strategic thinking

The five misconceptions are:

1. A strategy is the same thing as a plan;
2. Strategic management only involves the

- development of a strategic plan;
3. Communication plan objectives should be linked to the organization's strategic plan objectives;
 4. Managing the PR/Communication function strategically means speaking with one voice, and having a common set of messages derived from the organization's objectives; and
 5. Strategy follows objectives in our communication planning template.

To better understand why these are misconceptions, let's examine each of them.

Analyzing the misconceptions

1. A strategy is the same thing as a plan.

More times than not, we equate strategy only with a plan. Ask for a strategy and a written communication plan is produced. Yet, Henry Mintzberg gives the concept of strategy five definitions.

1. "Strategy is a plan." He doesn't mean a written plan – a strategic plan – per se, but "a course of action, a direction into the future, a path to get there from here." This course of action is only one element of strategy.
2. "Strategy is a pattern." It's a pattern of actions and behaviors over time. By looking at past behavior, one can predict next moves because strategy evolves in increments.
3. "Strategy is a position." Strategy comes from "looking down and out." It's outward looking, placement vis-à-vis competitors. It's about distinctiveness, and adapting continually to maintain it.
4. "Strategy is perspective." It comes from "looking inwards and upwards." It's about a grand vision, a great leap of faith, based on intuition. It's about what Peter Drucker calls the organization's "theory of business." It's about us, what we will be.
5. "Strategy is a ploy." It's a "maneuver to outwit an opponent." It's one-on-one. It's a chess move. It's scenario planning: they do this – we do that.

Being a strategist is not about being a good planner. It's about thinking about a problem, a required decision, from a variety of vantage points. Or as crusader James Lukaszewski has said repeatedly, strategy is "a state of mind," "a mental state," "a method of thinking," "a fresh approach" and "mental energy." A sound communication strategist can see the stepping stones on the path forward, see a pattern in past decisions taken, see our tree among the forest of competitors, see our desired state

Fraser Likely is Partner and President of Likely Communication Strategies Ltd. For the last 15 years, as a PR/Communication performance management consultant, he has worked with and coached hundreds of senior managers, helping them benefit from improvements to the organization, performance, measurement and strategic capabilities of their PR/Communication function.



bathed in white light, and see the choreography needed for the hand-to-hand fight sequence. It's the big picture, with snapshots from each strategic viewpoint, from which a unique strategy will unfold. And then a communication plan, if necessary.

2. Strategic management only involves the development of a strategic plan.

When reading PR/Communication literature, to be strategic we're told, one must be part of the strategic management of the organization. For a good many authors, this implies that the PR/Communication manager must participate in the development and execution of the organization's strategic plan.

A strategic plan would be the formulation of an organization's deliberate, intended strategy. It's a formal process, usually led by a central planning group. In *Strategy Safari*, Henry Mintzberg quotes a study that suggests that "only 10 percent of formulated strategies actually got implemented." He goes on to say that management guru Tom Peters found the 10 percent figure to be "wildly inflated." A growing number of organizations have given up producing elaborate strategic plans. Instead, they develop a ▶

HOW TO BE A SUCCESSFUL STRATEGIST

A successful strategist will have some if not all of the following tendencies:

- Looking and listening to find meaning in a wide variety of weak signals from within the organization and from the organization's environment.
- Visualizing in three dimensions: progressively (see past, present and future); peripherally (see what's at the edges of the 360° boundary); and vertically (see internally from top to bottom).
- Harboring conflicting ideas at the same time.
- Keeping sensitivity filters (ethics, moral values, social responsibility, common sense) on at all times.
- Building, dissecting and re-building scenarios, strategy maps and forecasts.
- Creating new concepts and new language in the organization.
- Maintaining dual loyalties (be a loyal employee and a strong advocate).
- Understanding time flow with regard to future actions, reactions and consequences.
- Knowing the difference between reality and the organization's internally constructed version of reality.
- Appreciating the dynamics involved in making a decision on strategy.

- ① small number of strategy themes (usually involving ideas like operational effectiveness, customer/stakeholder management and product/service innovation) and a strategy map (really a visualization in pictures of the five strategy viewpoints). Then, they let operational strategy emerge from within the organization.

What does this all mean? It means that in today's world, strategic management encompasses two types of strategy development: deliberate strategy formulation, and emergent strategy formation. Emphasis is on the latter.

We can contribute to our organization's formal strategy planning process by:

- establishing formal environmental scanning systems and identifying potential issues;
- setting up formal issue tracking mechanisms and identifying stakeholders (all publics including employees and customers), their positions and behaviors;
- assessing communication and relationship-building capabilities by providing effectiveness measures for communication products, communication programs, stakeholder relations and organizational reputation;
- assessing the gaps among the first three; and
- identifying the stakeholder behaviors and relationships and the change required.

But, if organizational strategy mostly emerges – it is formed not formulated – then strategy development becomes continuous and decentralized with more players.

The communication manager will make the same contributions as in the deliberate strategy formulation process, but instead of once every year or two, the contributions could be twice a year, maybe quarterly or even monthly.

Intelligence gathering is of the present not of the past. Without a large strategic planning office, there is a greater need to “facilitate” the ongoing strategy formation process. Given the breadth of the communication function, a shared role the PR/Communication manager can play is to illuminate emerging strategies and help with their convergence. Being a participant in the strategic management of the organization is less about being a small player in the development of deliberate strategy and more about being a bigger player in the merging of (disjointed, incremental) emergent strategy.

3. Communication plan objectives should be linked to the organization's strategic plan objectives.

This premise also is stated as, to be strategic, one must “ensure that the communication objective is in direct support of an organizational objective,” or “tie our messages directly to the organization's objectives.” In either case, the concept on tying is correct. What's not, is tying to organizational objectives. Our communication objectives must be tied to business unit or central function operational objectives. These operational objectives are, or should be, behavioral. They should state who will change (customers; employees; suppliers; stakeholders; investors; management; etc.), in what way, by how much and by when. In a results-based organization, the only result that matters is a change in behavior (market segment x bought more widgets; employee segment y became more productive; stakeholder segment z supported our environmental policy; etc.)

In a results-based organization, the business unit objective of behavioral change is stated as a “Key Result.” An achieved communication effectiveness outcome is one indicator of performance towards that result. Our communication program planning objective becomes a Performance Indicator statement in the business line document.

To be strategic, we must assist our internal clients, as Michael Campbell has said, with the “framing of (behavioral) business objectives” or key results. Then, we must set measurable communication outcome objectives, that become measurable performance indicators in the business unit plan. In this way, objectives are tied –

SETTING STRATEGIC OBJECTIVES

Communication strategy development is part of a business unit/central function strategy development process. Through research-driven joint efforts between a business unit and the PR/Communication account team, key performance results, performance indicators and measurable communication objectives are established. For example, a possible Key Performance Result for the HR function may be: increased participation of eligible employees in early retirement, more cordially known as the “Golden Handshake Plan.” The performance target or measure may be set at 25% participation from a specific employee segment. From there, the two groups will develop performance indicators, measurable indicators of movement towards the target. Some could be non-communication indicators; most will be communication – such as changes in awareness, understanding or perceived constraint levels. The key performance result, the performance target and the performance indicators go into the HR performance plan. The performance indicators, which are communication in nature, become the communication objectives in a communication plan. Examples of possible measurable communication objectives follow:

1. Communication objective: 90% of target employee segment will be aware of the plan by September 1st.
2. Communication objective: 60% of the 90% will understand the plan's details and implications by October 1st.
3. Communication objective: 75% of the 60% will address perceived constraints and express interest by November 1st.

The measures for this segment may be: 100 employees; 90 aware; 54 understood; 40 expressed interest; and 25+ participated.

strategically. A more specific example of how this works is detailed in the sidebar, left.

4. Managing the PR/Communication function strategically means speaking with one voice, and having a common set of messages derived from the organization's objectives.

I'm looking forward to the day when "messaging" and "aligning messages" and "getting messages out" are sentiments expunged from our vocabulary. Relationships and behaviors are strategic, relating to strategy development: messages are not. Messages, at best, are tactical. Regardless of our mythology, there is absolutely no evidence the "one voice" or the "perfectly crafted message" affects the success of strategy formulation, formation or implementation.

While employing a singular message across the full PR/Communication function may contribute to the development of a better horizontal working relationship among the function's sub-units, it does not make the function strategic.

These are seven factors that contribute to the function being truly strategic:

1. recruit, train and retain talented strategic thinkers;
2. practice zero-sum budgeting and align resources (time, budget, best performers) with strategy implementation priorities, while maintaining flexibility to adapt to emergent strategies. Ensure "historic" communication programs and products (what Jim Grunig would call a program or product without an immediately recognizable strategic origin) are evaluated and trimmed on a regular basis;
3. maintain a comprehensive environmental scanning intelligence-gathering system that includes organizational positioning and competitor, stakeholder and issue identification elements. Intelligence gathering also includes competitive information on competitor PR/Communication functions;
4. maintain a complete issue tracking and management system;
5. maintain a comprehensive organizational performance history and a current performance status intelligence-gathering system. A better contribution can be made to emergent and operational strategy processes if information is available on past and present performance behaviors and stakeholder relationships. Strategic patterns emerge from a good corporate memory archive;
6. maintain a measurement system for communication product outtakes, program outcomes and stakeholder relations;

7. act as a "business consultant" and solve a business problem.

5. Strategy follows objectives in our communication planning template.

Most communication planning templates address:

- research/SWOT analysis;
- communication objectives;
- communication strategy;
- key audiences;
- key messages;
- tactics;
- budget;
- timeframe.

What goes into the section on communication strategy? Maybe something important from the research. Maybe something on the tone of communication. Maybe something on channels of communication (top-down; face-to-face; whatever). Maybe something on the audience.

This is always a difficult section to fill out. Why? Well, it simply does not belong there. The primary reason it does not belong is that the information included is operational not strategic. Secondly, the real strategy deliberations occurred before the communication objectives were established. The section is not therefore needed.

Ultimately . . .

PR/Communication managers can contribute to the organization's deliberate (intended) strategy, its emergent strategy, and the unit/function operational strategy. All three of these become the organization's actual, realized strategy.

In conclusion, the top five misconceptions have been explored, but sadly, misconceptions about communication strategies are greater than that. Suffice to say, in today's job market, dealing with these five will help future strategists keep or earn that senior position she or he wants. scm

Notes & further reading:

1. *Excellent Public Relations and Effective Organizations: A Study of Communication Management in Three Countries*, Grunig, Grunig and Dozier. Lawrence Erlbaum Associates. Spring 2002.
2. *The Strategy-Focused Organization*, Kaplan, Norton. HBSP. 2001.
3. How to Develop the Mind of a Strategist, Presentation to PRSA Annual Conference, 2000, James Lukaszewski.
4. *Strategy Safari*, Mintzberg, Ahlstand and Lampel. Free Press. 1998.
5. *The Leadership Solution*, Shaffer, McGraw-Hill. 2000.
6. Are we ready? *Marketing* magazine. Feb 22 1999, Michael Campbell

CONTACT

Fraser Likely
Likely Communication Strategies

e-mail:

likely@intranet.ca