

# Business Planning

## STRATEGIC ANALYSIS AND PLANNING: THE FOUNDATION FOR SUCCESS

By Kendra Van Nostran

Most organizations recognize that business success relies heavily on well-crafted and executed communication efforts that are integrated with other organizational objectives. Further, businesses that implement sound public relations and marketing plans are more likely to achieve their goals, whether it's increasing sales, gaining marketing share or expanding into new markets.

For instance, consider a survey of Fortune 500 companies by the Council of PR Firms. The results clearly showed that the top 200, in terms of reputation, spent significantly more on internal and external communication than companies ranked in the bottom 200.

While creating a communication strategy may seem like a straightforward and manageable process, those involved are often unsure how or where to begin, finding themselves amidst a sea of questions.

What internal and external resources do we have available for developing and executing a strategy? How do target audiences currently view my company? Once our strategy is implemented, how do we measure success?

The good news is that formal communication planning

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approaches exist to help businesses arrive at the best strategy for meeting their unique goals and objectives. These formal approaches are part of a systematic process known as strategic analysis and planning.

Strategic analysis and planning involves research as the

initial step, followed by clearly defining an organization's challenges and opportunities. Next, efforts focus on overcoming the challenges and capitalizing on the opportunities. Then, planning directs available resources as efficiently and effectively as possible.

While strategic analysis and planning is frequently customized to meet a particular organization's needs and objectives, the goal is always consistent: to establish a shared vision and a plan of action that is understood by all the individuals who will be involved in the execution of a communication strategy. Further, important implementation details are set: who will do what by when, using what available resources and to what effect?

As part of this formal approach, numerous exercises can be central to the facilitation of strategic analysis and planning. Positioning, Self Exploration, S.W.O.T Analysis, Mission Statement Assessment, Vision Development and Brand Essence are all proven, valuable components in the overall process. The development of a strategic plan is usually the final step in the analysis session.

The benefits of each exercise are tremendous. For

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example, Self Exploration analyzes an organization's purpose and history, as well as the significant characteristics of its industry and competitors. This is important to the communication process because knowing what your organization stands for today and where you came from is crucial in discerning how you want to evolve. As business leaders can attest, the clearer an organization's consensus and understanding of these factors, the better equipped it is to reach its goals.

Critical internal and external issues are explored through S.W.O.T Analysis. Through this exercise, participants review their organization's specific strengths, weaknesses, opportu-

nities and threats. Strengths and weaknesses are internal factors that are typically within an organization's control, while opportunities and threats are external factors that are beyond an organization's control.

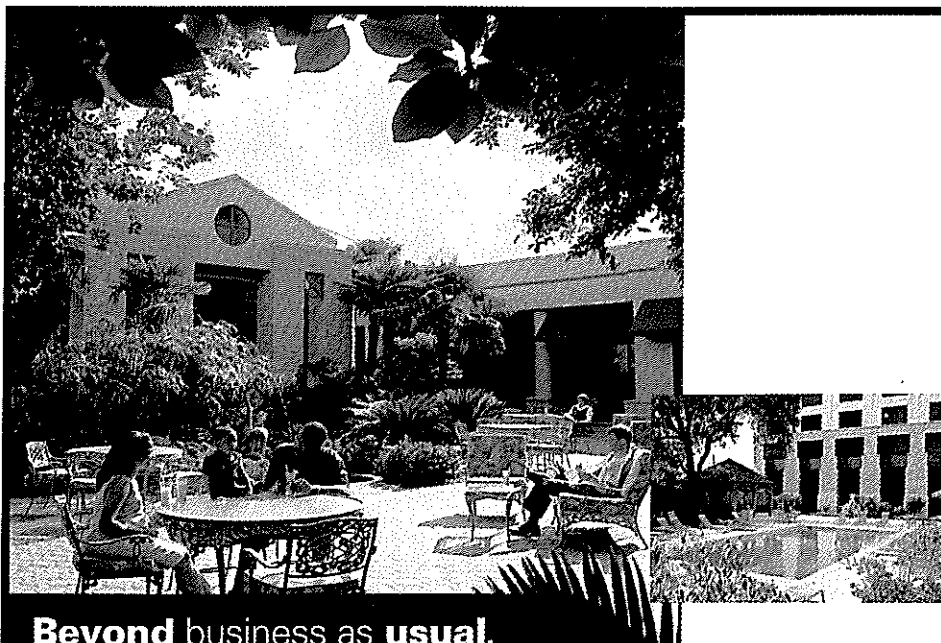
During S.W.O.T Analysis, the best results come from focusing on ways to manage and leverage both strengths and weaknesses. Yet, the key is to avoid looking at one set as positive and the other as negative. For example, an organizational strength that is not being used to its fullest potential would fall under the weakness category.

So how exactly do these efforts translate into communication success? Take the case of

Oceana, an international non-profit advocacy dedicated to restoring and protecting the world's oceans. Oceana wanted to develop a communication strategy that would support efforts to educate the public regarding the failure of Royal Caribbean Cruise, Ltd., (RCCL) to use available wastewater technology that could result in decreased ocean pollution.

As a new organization, Oceana lacked the deep resources of a multinational organization such as Royal Caribbean Cruise, Ltd.

"We knew from the beginning that this was a David and Goliath story," says campaign



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director Dana Dubose.

"Organizationally, we're the underdog in terms of the size of our funding compared to the enormity of our challenge and our opposition."

Deveney Communication recommended strategic analysis and planning as a necessary first step in their efforts to use communication to educate target audiences throughout the United States and Canada. This process would offer Oceana the focus, guidance and support required to effectively navigate a potentially overwhelming situation and achieve their substantial goals.

Among numerous considerations, Oceana needed to choose geographic targets, understand current public perceptions regarding environmental policies and Royal Caribbean Cruise Line, anticipate opposition, identify the best tactics for accomplishing goals and develop a timeline for implementing their chosen tactics. And, all of this needed to be done within the budget of a nonprofit organization.

Strategic analysis sessions were held to develop key messages and facts that serve as the basis for all campaigns, as well as a list of specific tactics. In communication planning, preparing a defense can often be as important as developing your offense. With this in mind, the analysis sessions were also used to anticipate ways in which Royal Caribbean might react to

Oceana's tactics and the best ways to respond to those reactions.

Finally, geographic markets were also prioritized during the strategic analysis. For this objective, it was important to look at numerous factors. For

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example, which markets can offer the most media coverage of Oceana's messages? Where are Royal Caribbean's port cities located? Where are the most environmentally aware and active citizens located through-

out the United States and Canada?

In researching these avenues, we were able to successfully identify the markets that would play the most significant role in achieving Oceana's desired outcome. From a complete list of 42 target markets, we were able to prioritize them and develop a list of the top 10 media markets most suitable for delivering Oceana's key messages.

We further prioritized the top 10 into 3 tiers of increasing importance. This specificity allows you to target limited resources, such as time, dollars or staffing, to focus on the most productive or important areas of a business strategy during implementation.

Once the analysis was complete, the focus turned to planning so that Oceana would have a strategy that could be executed through a planned series of tactics. Among the many tactics addressed in the planning phase were:

- \* Media training for Oceana spokespersons
- \* A national strategy translated into a local action plan for each market
- \* Coordination of speaking engagements to reinforce key messages
- \* The establishment of critical partnerships and alliances that could help further Oceana's efforts

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A timeline and budget were also outlined for each tactic included in the strategy. This ensured that the overall communication campaign ran smoothly and was integrated with other efforts while being able to accommodate any twists and turns the campaign might unexpectedly take.

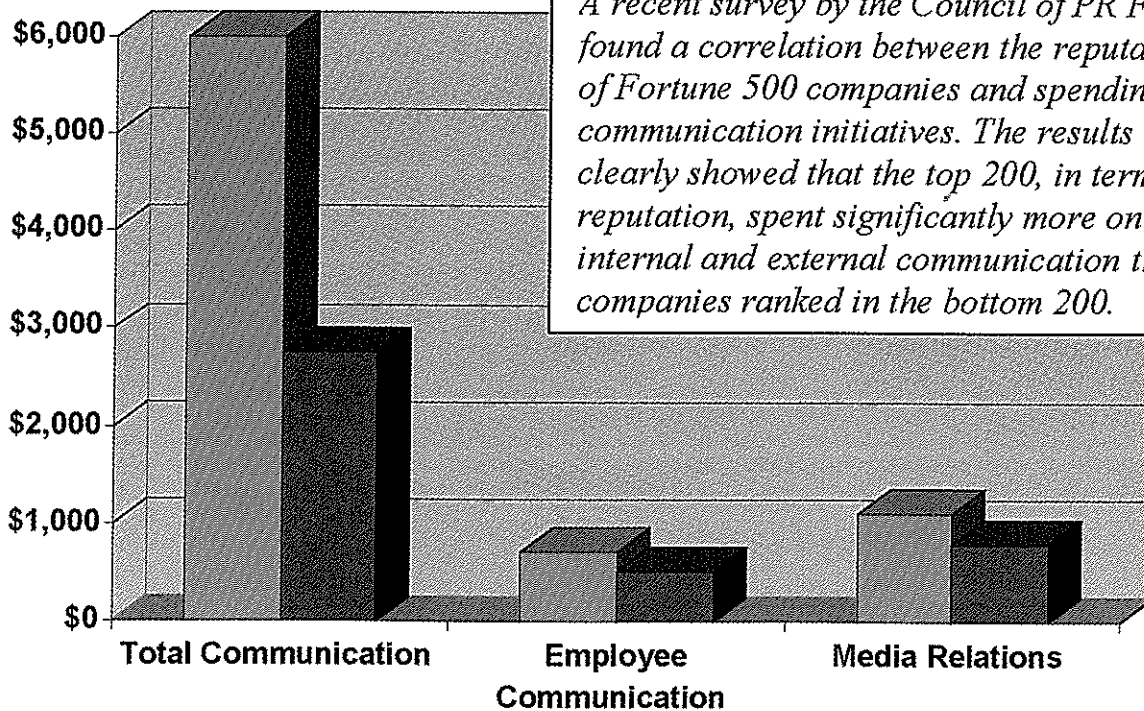
In turning to strategic analysis and planning to craft a communication plan, Oceana was able to determine the most relevant messaging to achieve their goals, but also how to best disseminate their message given available resources.

In just the few months since the campaign's launch, Oceana's voice has been heard across the United States and Canada through more than 100 positive stories promoting Oceana's cause. Coverage was secured in targeted media outlets, including the Anchorage Daily News, San Diego Union Tribune, CBC Radio News, Miami Herald, The Times-Picayune, and USA Today.com.

The campaign's launch announcement alone garnered over 185 million impressions, producing a publicity value of over \$4 million.

"Strategic analysis and planning was the wisest start, it allowed us to work smart, rather than just hard," notes Dubose. "The process has resulted in tremendous success against a modern day Goliath."

In the hyper-competitive marketplace of today, a single misstep can be not only costly, but also fatal to a business initiative. Strategic analysis and planning is often the difference between a business watching their sales and market share soar past projections or waving as the competition passes them by.



*A recent survey by the Council of PR Firms found a correlation between the reputations of Fortune 500 companies and spending on communication initiatives. The results clearly showed that the top 200, in terms of reputation, spent significantly more on internal and external communication than companies ranked in the bottom 200.*

U.S. Dollars in Thousands

■ Top 200 ■ Bottom 200

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