

# Roles of Practitioners and Strategic Planning Practices

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Role activities of public relations practitioners vary depending on hierarchical layers within the unit or organization. Generally, practitioners at the entry-level perform technical tasks; whereas, practitioners at the higher levels do more managerial roles. To create excellent public relations for an organization as well as to gain management acceptance, more and more practitioners and scholars have echoed that practitioners should acknowledge the importance of strategic planning concept to formulate their programs and performance supporting organizations' mission and goals (Forbes, 1992; Murray, 2002; Daugherty, 2003; Holt, 2005; Wiener, 2006). Additionally, in today's highly competitive environment, top management has begun to demand measurable results from public relations function as needed from other functions (Weiner, 2006, p.7). Thus, strategic planning skills become fundamental to manage public relations programs tied to organizational goals, and improve meaningful results (Graham, 1997; Gray, 1999, Weiner, 2006, p.112).

Strategic planning is a subject that has been widely explored both theoretically and empirically in several sectors. So as in public relations field, the concept of strategic planning has been discussed by scholars and practitioners for a long time. However, the empirical evidence on the practice of strategic planning in public relations field is highly limited (Khodarahmi, 2009). To fill the gap, this study seeks to explore the extent of strategic planning process and instruments employed by public relations practitioners in their planning activities. Specifically, it aims to explore the extent of employing strategic planning practices with regard to practitioners' working or hierarchical level within the function.

## **Literature Review**

Dozier (1992) revisited the role studies and concluded public relations practitioners' roles into technician-manager categories. The technical tasks are primarily concerned with writing, producing, and disseminating communication pieces; whereas, public relations managerial works cover a range of activities including environmental scanning, counseling

of top management, and formulating communication strategies. In his study, Dolphin (2002) found that practitioners placed in different position within the hierarchy had different activities. According to the Excellence study, Grunig & Grunig (2003, p.325) distinguished the role of senior practitioners into an administrative manager and a strategic manager. Administrative managers typically manage day-to-day operations at a functional level, and strategic managers, usually heads of the unit, are responsible for communication at an organizational level.

### **Strategic Planning in Public Relations**

Strategic planning is a multi-stage process which helps to achieve organizational mission and goals. It provides framework, supported by tools and techniques, for clear goals, organizational focus and better understanding of changing environment (Wheelen & Hunger, 2008, p.5). As top management continually demands more effective programs from public relations function, numerous practitioners and scholars have published articles and textbooks illustrating the importance of the concept of strategic planning for improving their performance supporting organizations' mission and goals. For example, Daugherty (2003) and Smith (2005) presented how to utilize it at a functional level, while Lawson (2006) explained how to apply the strategic planning process step-by-step at an organizational level.

**Strategic planning process.** Based on the literature analysis, scholars and practitioners classify strategic planning process differently. In this study, the strategic planning process is divided into nine steps as follows: considering the organizational mission statement, assessing external environment, evaluating internal environment, identifying stakeholders' needs and interests, setting objectives, developing strategies, developing an action plan, setting criteria for evaluation, and reviewing the plan.

**Strategic planning instruments.** There are a number of instruments which have been developed to assist the strategic planning process. On the basis of the literature review, the frequent techniques mentioned in the public relations field are: PEST analysis, SWOT analysis, Stakeholder analysis, Gantt chart, Planning sheet, and Benchmarking.

## **Methodology**

The construct used in this study was designed from the literature and studies in this field. The questionnaire contained two parts. In the first part, respondents were asked to indicate their working level which was classified into managerial and operational level. The second part concerning strategic planning practices was classified into two sections: strategic planning process which was divided into nine steps, and strategic planning instruments which composed of six methods. All questions in part two used a five point Likert scale to measure the extent to which each participant embraced a particular step or instrument in their planning activities. The data required for the study were obtained through a questionnaire survey.

## **Findings**

Of the 117 practitioners that participated in the survey, 60.7 percent worked at managerial level and 39.3 percent worked at operational level.

Table 1 presents mean, mean rank and F-value of strategic planning process. For the whole sample, the mean value indicates that the respondents perceive the 'Consideration of Mission Statement' and 'Setting Criteria for Evaluation' as the most and least important steps in the strategic planning process respectively. With regard to working level of practitioners, Table 1 also shows that there are relative differences in rank order of importance to each step of strategic planning process. By comparing the mean value of each step, practitioners working in managerial level have a relatively higher regard to all the steps of strategic planning process with the exception of the 'Consideration of Mission Statement'.

The analysis of variance (ANOVA) procedure was conducted for each variable to compare the differences between the two levels. The F-values show the significant differences in the steps of 'External Environmental Assessment' ( $F=3.796$ ,  $p<.10$ ), and 'Evaluation of Internal Environment' ( $F=3.497$ ,  $p<.10$ ). Practitioners working at managerial level consider the steps of 'External Environmental Assessment' and 'Evaluation of Internal Environment' more important than those working at operational level.

Table 1  
Mean, Mean Rank and F-value of Strategic Planning Process

	All Participants		Managerial Level		Operational level		F value
	Rank	Mean	Rank	Mean	Rank	Mean	
Consideration of Mission Statement	1	4.17	1	4.15	1	4.20	.078
External Environmental Assessment*	6	3.89	7	3.93	7	3.65	3.796
Evaluation of Internal Environment*	2=	3.96	4	4.00	6	3.72	3.497
Identification of Stakeholder Needs & Interests	7	3.82	3	4.03	3	3.85	1.376
Setting Objectives	5	3.90	6	3.97	5	3.78	1.696
Development of Strategies	2=	3.96	2	4.04	4	3.83	2.440
Development of Action Plans	4	3.95	5	3.99	2	3.89	.426
Setting Criteria for Evaluation	9	3.61	9	3.65	9	3.54	.366
Plan Review	8	3.63	8	3.66	8	3.59	.196

Scale for strategic planning process: 1 – no importance, 2 – little importance, 3 – somewhat importance, 4 – very importance, 5 – utmost importance

\*p<0.10

Table 2 shows the extent of using a range of instruments by the respondents in the sample ranked by regularity of use. For the full sample of participants, the highest in rank is ‘Planning Sheet,’ which is followed by ‘SWOT Analysis’ and then by ‘Stakeholder Analysis’; whereas the lowest rank is received by ‘Gantt Chart’. This means practitioners working at managerial level have consistency a relatively higher use of a broad range of instruments except only ‘Benchmarking’ as compared to their counterparts working at operational level.

Table 2  
Mean, Mean Rank and F-value of Strategic Planning Instruments

	All Participants		Managerial Level		Operational level		F value
	Rank	Mean	Rank	Mean	Rank	Mean	
PEST Analysis	4	3.65	4	3.68	3=	3.61	.145
SWOT Analysis	2	3.78	2=	3.85	2	3.67	1.076
Stakeholder Analysis*	3	3.72	2=	3.85	5	3.52	3.617
Gantt Chart	6	3.07	6	3.17	6	2.91	1.464
Planning Sheet	1	3.88	1	3.89	1	3.87	.010
Benchmarking	5	3.55	5	3.51	3=	3.61	.266

Scale for planning instruments: 1 – not used, 2 – rarely used, 3 – somewhat used, 4 – frequently used, 5 – regularly used.

\*p<0.10

## **Discussion**

The evidence from the whole sample has largely indicated that practitioners regard 'Consideration of Mission Statement' as the most important step in the strategic planning process. This finding is not surprising, partly because Thai society is ranked high in collectivism - Thais tend to have strong relationships with members of family and groups (Hofstede, 2011); thus, public relations practitioners may concern themselves to fulfill organizational goals. The result is also consistent with Daugherty (2003) who proposed that organizational mission is a key to the strategic planning process. The participants also rate 'Setting Criteria for Evaluation' as the least important step which is actually consistent with Ekachai (1995) who contended that evaluation is rare in the context of Thai public relations. There are two possible explanations for this finding. The first is that practitioners may pay less attention to or avoid evaluating programs because the results might affect their positions or status. The second explanation is that they may think that this step must be shown in the evaluation – not in the planning stage. Furthermore, the study illustrates that the two most frequently used instruments are 'Planning Sheet' and 'SWOT Analysis'. This may be due to their familiarity and easiness. Another interesting point is that 'PEST Analysis' is ranked lower than 'SWOT Analysis'. This finding may imply that most practitioners do not undertake environmental scanning in their practice – something that a strategic manager must perform to create win-win situations as mentioned by Grunig & Grunig (2003, p.325).

### **Strategic planning practices by working level**

Based on the sample, the mean values indicate that practitioners working at managerial level appear to have greater emphasis to most steps of strategic planning process and highly consider the use of broader range of instruments as compared to their counterparts at operational level. These findings are not particularly surprising because public relations managers have overall responsibilities for counseling to top management and for developing the communication strategy to achieve organizational goals. Therefore, they need to utilize every single step of strategic planning process and various strategic planning instruments in their planning.

As to the strategic planning process, one-way ANOVA indicates that there are significant differences between managerial and operational level in two steps – i.e. practitioners working in managerial level consider the steps of 'External Environmental Assessment' and 'Evaluation of Internal Environment' more important than those working in operational level. One possible reason for the 'External Environmental Assessment'

step might be the emphasis on the managerial role of giving advice regarding business environment to top management. The environmental scanning which focuses on the identification of emerging situations or complex issues that may affect an organization's future and how it can respond strategically. A reason for the 'Evaluation of Internal Environment' step may be the responsibility to manage public relations programs and units. Thus, they need to consider their internal conditions including the personnel, budget and instrument to identify strengths and weaknesses to respond in a more timely and effective manner.

For strategic planning instruments, there are significant differences concerning the use of 'Stakeholder Analysis' between the two levels. This finding is not particularly surprising. The only possible explanation is that practitioners enacted managerial role might have to identify stakeholders whose behaviors will influence the organization and who will be influenced by organization's policy and actions. Therefore, stakeholder analysis is a must for developing effective public relations plans in order to build good relationships with their stakeholders.

## **Conclusion**

The evidence from the sample indicates that practitioners in both managerial and operational levels are highly concern on the strategic planning practices in their planning activities in order to achieve organizational goals and objectives. There are several points which can be contributed to the total explanation of this phenomenon. First, the roles of manager and technician vary from organization to organization (Gregory, 2000, p.13), and sector to sector (Hogg and Doolan,1999). Second, practitioners working at managerial level tend to utilize strategic planning practices at a functional rather than an organizational level. In other words, public relations managers are administrative managers rather than strategic managers. This finding is in line with Dolphin (2002) and Steyn (2003) who stated that many public relations scholars do emphasize strategic planning process at the operational level rather than at the organizational level.

The major contribution of this paper is that the provision of empirical evidence to both public relations and strategic management literature, which seem to have never presented any in their contents. The findings clearly support the importance of applying strategic planning concepts in the alignment of public relations programs within the organizational goals and mission - as proposed by many scholars and professionals (Forbes, 1992; Graham, 1997; Gray, 1999; Murray, 2002; Daugherty, 2003; Grunig and Grunig,

2003; Holt, 2005; Weiner, 2006). This study also identifies the extent of strategic planning practices that public relations practitioners utilize as extension of the role theory. In effect, this study might serve as an enlightenment of sort to public relations managers who pursue higher management acceptance or part in the dominant coalition. They need, however, to demonstrate their strategic planning competency at an organizational level. In particular, public relations managers must assess external environment that will highlight critical issues for their organizations. They must address and link communication initiatives to organizational goals. They must also evaluate their own projects and functions to determine the extent of contribution that their activities give to organizational goals and mission.

Although the findings of this study provide some insights into the strategic planning practices of public relations practitioners, some limitations should be noted. One limitation is the small sample size – which hinders the application of statistical techniques to analyze the data. Thus, any generalization to the findings must be considered with a caution.

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