



The Modern Communicator

PLAYBOOK

A Guide On Transforming
Public Relations And Earned
Media For The Better

CISION®

Introduction

Cindy had warned them to be ready, but no one believed her.

Within less than an hour after the product was formally launched — via press release, blog post and social media — Cindy's smartphone started blinking and buzzing like an arcade game, and because she'd left it on the boardroom table, everyone noticed.

"What's that all about?" Tamara, the CEO, asked her.

"I'm so sorry," Cindy said, hurriedly putting the phone back in her pocket. "We can discuss your schedule after we wrap this up."

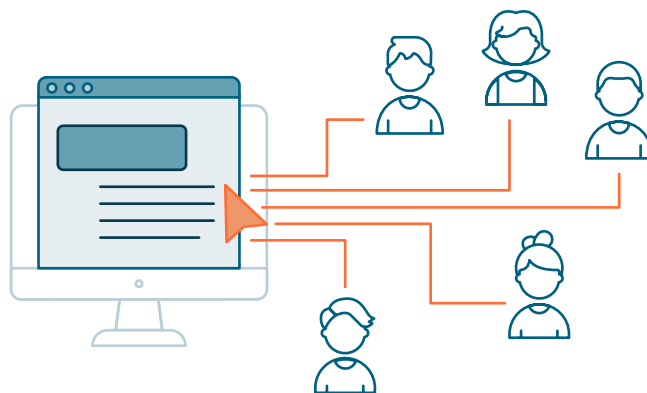
"Schedule for what?" Tamara asked.

Cindy glanced down at her phone. "Media interviews," she said. "We're getting a ton of interest." "Really?" asked Mark, the VP of sales, looking somewhat incredulous. "Since when did anybody care what we do?"

Cindy shrugged. "Well, we did things a little differently this time."

Tamara's eyes narrowed. "Like what?"

Cindy opened her laptop and turned it so it could face the rest of the room. "Everyone got the same press release, but the message within the e-mail we sent out was different for every reporter. They normally tend to ignore us because we're considered a smaller company in this space, but I was able to find out what each of them were working on in terms of big feature stories and we have a unique angle for each."



"And how many did you have to do?" Tamara asked.

"Not that many — that was the point," Cindy said, calling up her media list on the laptop. "Everybody you see here has a sizable audience within a sector we care about, and we were able to cross-check to make sure our contact was still working there and actively open to the pitch. We were also able to source a few new opportunities by looking at what people were saying on social media that related to the kinds of problems our new product could solve."

Mark's mouth was hanging open slightly. "Wow."

Cindy closed her laptop. "We should probably move on, though, because we're going to have to make a fair bit of time for you over the course of this afternoon, Tamara. I realize you have a lot of other things going on, but if you like I can give you a better sense of what this coverage will mean for us in terms of sales opportunities for the product."

Tamara sat back for a moment and folded her arms. "You keep saying 'We,'" she said, smiling. "But you did this, didn't you?"

Cindy smiled back. "**I told you this would work.**"

...

Although “Cindy” is a fictitious character, the scenario described above is not the stuff of fiction. It’s a portrait of what working as a modern communicator is all about, and it’s how the best in the profession are already adapting to a more data-driven way of bringing value back to their organizations.

Unfortunately, those like Cindy may still be in the minority. When senior marcomms leaders were asked to identify the areas they need to improve upon most regarding technology and data, “talent” was tied with “tools” as the top answer. And according to the 2018 Global Comms Report, **77 percent of senior communications leaders indicate that comms can still do a better job** at measuring and proving its impact on business objectives.

This is not a new issue. Back in 2014, for example, *Fast Company* magazine published its own look at **how shifts in traditional media were affecting the ability of PR professionals** to do their jobs effectively. The article’s closing paragraph is as true today as it was then:

At its core, PR is still about great storytelling, but the future of PR is about creating a shareable experience. Measuring only media coverage is a way of the past. PR professionals must now target to engage their clients’ audience and have them be a part of the news cycle.

If there is an increased urgency around this call to modernize the communications profession, it might be due to the digital transformation that has already taken place in other areas of marketing, sales and even HR. The automation of tasks in those functions, coupled with the ability to use analytics to improve business outcomes, leaves PR at risk of looking more like a cost centre than a contributor to key performance indicators like revenue. No wonder industry groups like the PR Council of India branded its most recent conference with the theme “**Transform Or Perish.**”

Of course, change is never easy, and there has been little ability for those working in communications to quickly bring together best practices that have sprung up among their peers and map out a potential playbook to begin their own journey. That’s what this guide is all about.



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How We Got to Now

In a way, corporate communications have always been data-driven. It's just that the data used to be more anecdotal.

Long before “chief communications officer” became a formal title, for example, Paul Garrett was **pioneering the concept of an in-house PR function** with General Motors in the 1930s. In a famous quote, Garrett — a former newspaper reporter who spent 25 years at GM — described his work as follows:

Public relations are all the things you do to make friends for the company in the hope of creating customers for the product.

In practice, “making friends” involved a wide range of activities, but a big part of it was about cultivating relationships with the right media outlets and the journalists who worked for them. This could involve everything from cold calls, organizing a press conference, or taking journalists out for a less formal meeting.

Journalists might never see professional communicators as “friends,” of course, but simply as conduits to subject-matter experts or official sources of information they needed to do their jobs. Ideally, media influencers would come to appreciate and respect

the PR or corporate comms professionals they got to know, turning to them first when news broke, or there was an important story to develop.

Michael Turney, a longtime professor of public relations at Kentucky State University, described these early days as the “**publicity phase**” of the profession, which tended to have a few basic characteristics. Corporate communications, he said, was:

- Basically a one-way process
- Something done to someone else
- Primarily focused on making an organization seem more interesting
- Relying almost exclusively on the mass media, *and*
- Using transmission theories of communication and/or diffusion theories of information and innovation as the basis for message dissemination

There have always been some tradeoffs from this approach, Turney noted. “There are some public relations people who operate like flamboyant press agents and tout their clients. Others come across like Machiavellian persuaders who try to bamboozle the public with less than reliable information,” he wrote, adding, “No profession should be judged by the shortcomings of a few practitioners.”



It's not merely that PR and corporate communications can have negative connotations, though. The changes that have hit the media industry, the marketing department and almost every facet of our daily lives mean **modernizing communications is no longer optional**.

Print Decline And Social Rise

Early in the 21st century, a few things happened at once that have provoked the shift towards data-driven approaches to PR. When media outlets added websites, email newsletters and similar channels to their traditional print newspapers or magazines, they were largely responding to the threat the internet brought to their traditional business model, which was based on brand and classified advertising. Corporate comms practitioners suddenly had a lot more ground to cover concerning monitoring the coverage they generated and the form it would take online.

Around the same time, services like Facebook, Twitter and more recently Instagram sparked debate about the notion of user-generated content created by “citizen journalists” who could reach audiences that rivaled traditional media in size and influence.

“When the financial meltdown hit full force in 2008, companies quickly discovered the power of the new communications environment. Stimulated by the 24-hour news cycle, the online community exploded with instantaneous, unfiltered information,” [an article published by Tuck University](#) back in 2010 noted. “Corporate communicators could no longer depend on traditional platforms such as public relations and advertising to disseminate — and control — their message. Nothing was unassailable, and every detail was important.”

Within other businesses, meanwhile, technology was having a transformative effect on nearly every departmental area. Sales teams were giving up their Rolodexes and beginning to share information about customers and prospects in CRM tools. HR departments were starting to use human capital management (HCM) systems to process everything from job applications to performance reviews. Finance departments began looking less historically at revenue and improving their ability to forecast through corporate performance management and business intelligence products.

The introduction of automation to these various lines of business meant that most key decisions — whether it was about expanding into a new market or changing the onboarding process for new employees — involved the gathering, synthesis and analysis of data from a variety of sources. Finding actionable insight based on data began to get woven into strategic planning. Results that might have once been evaluated based on intangible or “soft” metrics started to get weighed against more specific key performance indicators.

Suddenly, the idea that “all press is good press,” along with several other rules-of-thumb that had been regularly used to describe the impact of corporate communications, no longer seems tenable. Fortunately, though, modern communicators can take advantage of the same kinds of tools and practices to reposition themselves and their role in a way that will make their jobs easier, more dynamic and ultimately more fulfilling.



54%

According to the 2018 Global Comms Report, When asked to pick the **most effective form of content** to influence consumer buying behaviour, senior comms leaders **ranked social media first**, with 54 percent placing it among their top three.

The Modern Communicator as a **TEAM** Player

In its [State Of The Profession 2018](#) report, the U.K.'s Chartered Institute for Public Relations offers data that illustrates perfectly why the idea of a “modern communicator” is so important. The research, which included survey responses from PR practitioners as well as recruiters, concluded that many comms executives are struggling to receive recognition within the C-suite:

Although practitioners influence communications strategy and communication budgets, organizations are systematically undervaluing their PR functions — only 1 in 10 senior respondents indicated they were a member of an executive board. However, senior practitioners need to build their business acumen to break through beyond PR.

This doesn't mean everyone working in corporate communications needs to go back and get an MBA, necessarily. It's about adopting a set of behaviors and attributes that will make aligning with business objectives so routine that earned media will demonstrate an obvious and irreplaceable value. At Cision, we call this TEAM thinking. Here's how to break it down:

T is for Targeted

As the author of five best selling books, most recently [Talk Triggers: The Complete Guide to Creating Customers with Word of Mouth](#), Jay Baer was one of the first to recognize how brands need to treat communications as a dialogue with their customers. His work as a speaker and principal of consulting firm Convince & Convert has established him as one of



Watch "Modern Communicator Video Series with Jay Baer: **Targeted Comms**" here ►►►

the leading authorities on developing strategies that consistently generate word-of-mouth.

In a [video series on modern communicators](#) produced in partnership with Cision, Jay argues that some of the most successful PR efforts seek attention from the media outlets where it is most likely to resonate. Common sense though that may sound, it's something he says is often ignored.

“I started my career in public relations, and I have lived this truth personally,” he says. “Trying to squeeze media blood out of an untargeted stone is a cost, not a byproduct of the business.”

Targeting doesn't just mean creating a new media list. It starts by mapping out everything you can know about your organization's target customer. This means actively talking with those in sales, marketing and other functions which are on the front lines of speaking with actual customers every day.

Next, explore what kind of stories or information stories matter to them, and where they go to find them. The digitization of most content makes this a lot easier today. Pixel-tracking technology that is already used in traditional advertising can pinpoint the blogs, online magazines and other sources target customers turn to when they want to be informed, educated and inspired.

This data — which goes well beyond the circulation numbers or reputation of a particular outlet that drove comms decisions in the past — helps create an influencer graph. You can apply artificial intelligence technology like machine learning to correlate how much content a particular journalist or influencer is creating, who's paying attention to it and how it could align with the message you're trying to pitch.

According to Jay, an influencer graph like this can “turn earned attention from a fire-a-shotgun-in-the-air, hoping-a-bird-flies-by-simultaneously (approach), to a true targeted program.”



To Learn More, Download Our Whitepaper, "**Building an Influencer Graph: An Earned Media Management Strategy**" [here](#). ▶▶▶

E is for Evolved

PR has often been accompanied or complemented by paid media strategies like online ads, but more recently content marketing has introduced new opportunities in how organizations can layer on an “owned media” element to their strategy.

In some organizations, content marketing assets — which can range from whitepapers and infographics to **branded publications** like luggage firm Away’s *Here* magazine — are developed or led by the corporate communications team. In others, content marketing has a separate team or is driven by an outside agency. What matters, however, is the way in which modern communicators strike the right balance between earned, owned and paid to maximize the impact of the work they do.

This is just one example of how modern communicators think through these decisions on the fly:

Earned Media Trigger: Your company gets mentioned by a media outlet, which you discover via analytics tools that monitor social media and other channels. The number of likes, re-shares or other activity suggests the topic of the article is meaningful to audiences you care about.



Watch "Modern Communicator Video Series with Jay Baer: **Evolved**" [here](#) ▶▶▶

Owned Media Opportunity: You develop additional insights that build upon what was published by the media outlet and post it to your firm’s company blog or resource center.

Paid Media Amplification: You purchase online ads or launch a paid social media campaign that allows you to boost the reach of the blog post, which links back to the earned media mention, maximizing the audience for both while helping to ensure your firm ranks for the best keywords.

This practice of assessing what’s happening, reinforcing what’s working and adjusting tactics as necessary dramatically increases a modern communicator’s ability to make an impact on leads and other elements of the sales funnel in B2B. In a B2C company, it allows the organization to connect with consumers who might be impossible to pinpoint otherwise.

Cision’s own CMO, Chris Lynch, describes this approach as “smart engagement,” because it allows comms teams to focus on only the right content for the right audiences:

“Imagine a retailer is launching its new summer line of clothing,” he wrote in [an article on Forbes](#). “Rather than issue one press release announcing the new product line, the brand could distribute three discrete press releases about their male, female and kids clothes within that launch. The retailer could then distribute those releases to specific influencers who review those respective areas of fashion. To make the experience more dynamic, the brand could also include a specialized video and image library to tell a more visual story.”

Modern communicators are “evolved” because they recognize they can blend earned, owned and paid media rather than looking at them as silos that have to work independently of each other.



To Learn More, Download Our Whitepaper, "**Smart Engagement: An Earned Media Management Strategy**" here. ►►►

A is for Agile

When startups and even large companies want to be more agile — that is, to move quickly and easily in response to what happens — they often look to models of disruption such as those outlined in *The Innovator's Solution*. Authored by Clayton Christensen, the book has continued to inspire dynamic leaders all around the world. Kevin McCann, however, is one of the few to look at it from a PR perspective.

A Partner at NATIONAL, McCann published [a post on his firm's blog](#) that suggests modern communicators focus on "jobs to be done," treating PR as something far more nimble and responsive to customer needs than a once-and-done activity. This means a shift in perspective that might see modern communicators think in 24/7 cycles and doing away with some pretty standard practices.

"Organizations love multi-year communications plans — a playbook to guide investment of budget and time. This kind of document is often presented to a board and executive, and depending on how prescient and dense it is, it collects dust or actually gets used," McCann writes. *"Building in a malleability and acceptance for emergent and unpredictable strategies — perhaps from a disrupting competitor — is important, wise and useful. It's an antigen for bureaucracy."*

Cision's Vice President of Marketing Communications, Nick Bell, makes similar sentiments in [a series of articles](#) based on a conversation with Cision Vice



Watch "Modern Communicator Video Series with Jay Baer: **Agile**" here ►►►

President of Digital Marketing Steve Arentzoff. Nick argues the "batch process" mentality is not going to be sufficient to satisfy most business needs.

They only push communications infrequently, like when they have a press release-worthy news announcement or get around to sending out an email blast. The modern communicator understands that he or she needs a continuous campaigning model to constantly stay in front of their audience in a relevant way.

M is for Measurement

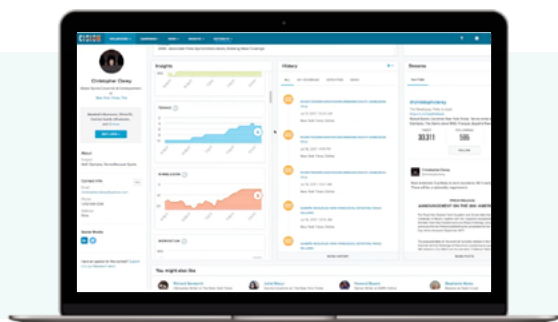
In the story that opened this eBook, Cindy hinted to her CEO that she could make a direct correlation to the earned media coverage her work was generating. Not surprisingly, the CEO was all ears. Much like when a CMO can point to marketing qualified leads (or even better, sales accepted leads), a chief communications officer who can identify customers or prospects and offer guidance on the best way to reach them will have immediate credibility within the highest reaches of an organization.

Of course, comms teams have always offered numbers in their reporting, whether it was share of voice or the number of stories that came out of a particular campaign. True measurement, on the other hand, looks at a wider range of metrics that could include sentiment, prominence, key message, executive quotes and more.

In [an interview published by the Institute For PR](#), Weber Shandwick exec Allyson Hugley criticizes the idea of using measurement as a *"performance tool — a way to prove success or failure,"* and instead of



Watch "Modern Communicator Video Series with Jay Baer: **Measured**" here ►►►



Cision provides tried-and-true platforms for PR and comms professionals that simplify the communications process, from media outreach to monitoring and measurement. ▶▶▶

thinking of it as identifying opportunities to create business value. She calls this a "build" mindset that all modern communicators must adopt. "We should be actively using data and applying it to future work versus reporting on past activities," she said. "Across the industry, we have to do a better job of communicating and then demonstrating the value of a build mindset specific to data. Data is a critical ingredient for growth – but PR tends to not treat it as such. Data builds relationships and data builds business – agency to brand and brand to customer. Overcoming resistance means focusing on how to build more with data, rather than report it."

When it's done right, modern communicators can evolve to a point where they are working with one established set of reporting mechanisms, with a unified data model and metrics that show how comms drives business results. They also have one definition of success, whether the work they do is performed in-house or with third parties like agencies. And finally, modern communications work in a single, integrated way that leverages paid and owned communications as well as earned.

"It seems like a wake-up call has happened," Cision CEO Kevin Akeroyd says in a video series that explores measurement in more detail, as well as other C-Suite topics. "This has been one of the industry's a-ha's — where it's not just reaching influencers for influencers' sake but to drive an outcome with a target audience. Leading brands are treating it that way."

Bayer's SVP of comms, government relations, and policy, Ray Kerins, sums it up perfectly in the same video clip:

"Our ability to measure has to do with not looking at the number of clips, not looking at the share of audience. It has to do with the ultimate impact that particular publication or news organization is having on the end user. Did we change your mind, your opinion, your thoughts about us?"

True measurement allows modern communicators to bring forward insight that executive teams can use to identify potential areas of opportunity creation or risk mitigation, Kevin adds. By measuring every aspect of their campaigns on every channel, and on every type of media, the comms team is coming to the table with metrics that are aligned with the language spoken in the rest of the marketing function — and the rest of the C-Suite, for that matter.

Start Becoming A Modern Communicator Today

PR and communication professionals aren't the only ones challenged to shift the way they work, including the way they develop and bring forward ideas. A recent article in the *Harvard Business Review* called '[3 Ways To Build A Data-Driven Team](#)' goes over the need to train (or in some cases retrain) various business functions and to hire the right people. The No. 1 priority listed, however, was to develop critical thinking skills.

"As organizations turbocharge their ability to gather more and more data — and it's not so much about size, but rather about quality — what matters most is having people who can ask the right questions to the data," the author writes. "This means questioning your own biases, distrusting your intuition, and displaying a healthy degree of skepticism when presented with ideas and suggestions from others, in particular, your team . . . Instead, celebrate critical thinking, curiosity, and the deeper desire to question things."

The benefits of doing so go beyond comms and affect the entire organization. According to [a survey-based report from Forrester Research](#), for instance, companies that demonstrate an ability

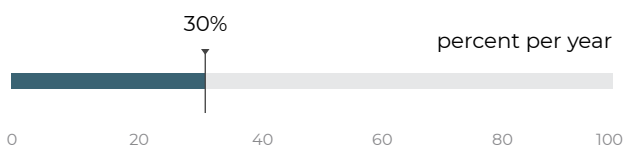
to get insights from data effectively grow, on average, by more than 30 percent a year. Unfortunately, this can still be a bit easier said than done. The Forrester study also shows that while three-quarters of companies want to be more data-driven, only 29 percent believe they have been successful so far.

Don't let that statistic discourage you, however. Instead, see it as a chance for modern communicators to pioneer data-driven thinking in their organizations, or to help the acceleration that may be underway in other parts of the business. While the journey may look a little different for each company and individual, here are a few ideas on how to begin applying some of the ideas we've shared in this paper immediately:

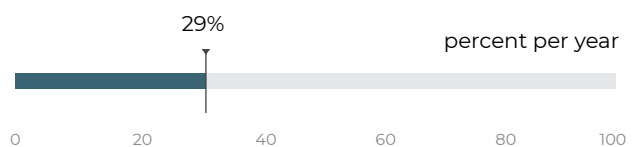
1. Assess Yourself:

Think about the TEAM model and where you fit in. Does your comms program check the right boxes? If not, make a plan to evolve your organization. Start by listing out small changes you can make and develop a long-term strategic plan to work towards the goal of implementing a TEAM approach.

30% According to a survey-based report from Forrester Research, companies that demonstrate an ability to get **insights from data effectively grow, on average, by more than 30 percent a year.**



29% The Forrester study also shows that while three-quarters of companies want to be more data-driven, **only 29 percent believe they have been successful so far.**



2. Reverse-Engineer a Previous Campaign:

They say hindsight is 20/20, so looking retrospectively at the work you've done might be a good way to establish what you can do differently on your journey to becoming a modern communicator in the future. Was the campaign as targeted as it could be, for instance? Were you able to quantify "smart engagement" based on the results you generated, the way an evolved comms professional does? Were you able to take what you've learned and adjust your strategy in an agile way? Did you measure the right things?

Don't worry if this looks like a particularly negative post-mortem on a campaign or project. It's an exercise in getting better with whatever comes next.

3. Be an Investigative Reporter:

If you've sat through media interviews with your executives, you've likely heard some softball questions and others that brought out major lessons learned or practical insight. Use that same journalistic methodology as you connect with other functions in the organization that are seen as having a direct bottom-line impact today, whether it's sales, operations or even other parts of the marketing department.

Develop a brief for yourself on the kind of information that would bring meaning to them and the work they do, as well as your own. Instead of publishing this in a story format the way a media outlet would, though, use what you hear to create tactical steps that touch on every letter in TEAM.

4. Be as Vigilant in Spotting Best Practices as Brand Mentions:

Keeping an eye on what's being said about your employer in the news is a standard part of corporate communications, but you can do the same thing to track and find sources of education or inspiration on modern communications.

Besides all the resources such as whitepapers, case studies and blog posts from Cision, look for industry publications like *PR Daily*, which has a dedicated section called '[Data-Driven PR](#),' as well as industry events where you can ask questions from successful keynote speakers about the way they've embraced TEAM (whether they call it that or not).

5. Pilot And Iterate:

Becoming a modern communicator doesn't always happen overnight. Instead, you can focus on whatever you perceive as your weakest areas first, or where you believe you could see results earliest. Before you need to present results next time, for instance, look at how you could tweak your approach to achieve "true measurement" in your reporting. If possible, reset the timeline on an announcement or campaign so you can create an influencer graph that allows more granular targeting.

The point is to benchmark yourself or your team, figure out a small pilot project and then iterate or optimize how you make data-driven decisions. Becoming a modern communicator is an exercise in continuous improvement.



The role of communications has shifted and expanded so much in the past 2-3 years. It can be a little scary, but it's also the greatest opportunity EVER for professionals in the field to make a huge difference in their organizations by becoming valued Modern Communicators.

—JAY BAER, CONVINCE & CONVERT

Final Thoughts

In the same way, don't forget to celebrate your successes as you begin to make progress. Offer a summary of a successful campaign in an internal employee newsletter or blog. Host a lunch n' learn to show your sales team how you're starting to further their ability to close deals. Create an internal infographic you can print out as a poster that can be displayed as a visual reminder of what your data-driven approach is starting to look like.

Externally, share what you've learned (omitting any confidential details, of course) about how you're putting TEAM into practice via a post on LinkedIn, or in the comments and annotations you make on other LinkedIn postings. Be transparent with key media contacts the next time you meet them about your commitment to becoming a modern communicator —

it will help them too, and they'll likely be candid with feedback on where you might still need to grow.

Becoming a modern communicator isn't just about adopting a new attitude. It also means learning more about the tools and technologies that will transform the way you tell stories about your organization and the way others tell stories about it, too. This isn't a journey you have to take on your own. Choosing the right provider early in the process will give you the resources to collaborate, support during challenges and ongoing opportunities to tap into industry experts.

As the word “modern” suggests, there's no time like the present. The time to make changes in your work for the better starts now.

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