



NTC BUSINESS BOOKS

Publicity & Media Relations _Checklists_

**59 PROVEN CHECKLISTS
TO SAVE TIME, WIN ATTENTION,
& MAXIMIZE EXPOSURE WITH
EVERY PUBLIC RELATIONS &
PUBLICITY CONTACT**

David R. Yale

Publicity & Media Relations Checklists



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Dedicated to my wife, Margaret White

Introduction

I wrote *Publicity and Media Relations Checklists* for the seasoned publicist as well as the beginner. Checklists have always worked like magic for me. They help me step back, get an overview of the process, and then methodically fill in the details. They keep me from losing sight of the forest for the trees. And they help me remember the myriad details that are an essential part of publicity.

I think they will be just as useful to you.

The checklists in this book are interactive. They give you information as well as a framework that lets you input more facts and details, and then draw your own conclusions.

These checklists are designed to help you make essential decisions, keep track of details, organize information, create permanent documentation for your publicity materials in case they are challenged at a later date, and develop powerful strategic approaches to individual projects and your entire publicity program.

There are checklists that will help you develop a news peg, comply with Securities and Exchange Commission regulations, plan a news conference, localize a story, create the best possible video news release on a budget, handle controversy, pitch a feature story idea—and lots more.

Many of these checklists are intended to be filled out each time you do a project, while others should be filled out once and reviewed regularly. But they are all designed to make your job easier *and* get you better results.

Since this is an interactive book, I invite you to interact with me. Let me know how you're using the checklists, as well as any suggestions you have for improving the next edition. You can reach me in care of NTC Business Books, or on CompuServe at 70363,3660.

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Part I

Goal Setting and Market Analysis

Before you can create an effective, successful publicity campaign, you must know what you want to accomplish and what your capabilities and limitations are. The checklists in Part I will help you identify who needs to be involved in the approval process for each type of campaign and what objectives your campaigns need to achieve. The lists will also help you identify your audience for each product line, service, or issue, and decide on the best ways to reach that audience.

1. Defining Your Authority
2. Publicity Goals
3. Targeting Your Audience
4. Motivating Your Audience
5. Using Misconceptions to Your Advantage

Defining Your Authority

You must define approval processes and the exact limits of your authority in order to be a top-notch publicist. This checklist will help you approach that task in an organized manner. It's a good idea to review these arrangements and understandings periodically, and whenever there's a change in management in your organization. Finally, get your supervisor to initial this worksheet at the bottom, so you and he or she are sure you understand each other completely.

Date this checklist was filled out: _____

Review these arrangements again on: _____ (Enter this date in your appointment book.)

1. In the left-hand column, write down all the decisions you have to make as a publicist. Then check off whether you need approval from someone else, and fill in who you discussed this with.

Decision	Approval Needed	Approval Not Needed	Exceptions	Discussed With
Publicity priorities	_____	_____	_____	_____
Expenditures under \$_____	_____	_____	_____	_____
Expenditures over \$ _____	_____	_____	_____	_____
Others	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

2. In the left-hand column make a list of all the types of publicity you will produce. In the other columns, list the people who will need to approve each project. If you have multiple products and services with different approvals needed for each, you can photocopy this checklist and complete it for each product or service.

Type of Publicity	Approval Needed From	Approval Needed From	Approval Needed From
How to choose, buy or use our product or service	_____	_____	_____
Interesting facts about our product or service	_____	_____	_____

Defining Your Authority

Type of Publicity	Approval Needed From	Approval Needed From	Approval Needed From
Satisfied user stories for our product or service	_____	_____	_____
How our product or service meets the needs of consumers	_____	_____	_____
Counteracting misconceptions about our product or service	_____	_____	_____
Interesting facts about our industry	_____	_____	_____
Counteracting misconceptions about our industry	_____	_____	_____
Informing the public about issues concerning our organization	_____	_____	_____
Informing the public about issues concerning our industry	_____	_____	_____
Informing the public about legislation concerning our organization	_____	_____	_____
Informing the public about legislation concerning our industry	_____	_____	_____
Financial information about our organization	_____	_____	_____
Publicity that could impact our stock price	_____	_____	_____
Human interest stories about our employees	_____	_____	_____
News about promotions and retirements	_____	_____	_____

Defining Your Authority

Type of Publicity	Approval Needed From	Approval Needed From	Approval Needed From
Information about careers in our organization or industry	_____	_____	_____
Publicity for events and programs	_____	_____	_____
Other	_____	_____	_____
	_____	_____	_____

3. Are there more than two levels of approval needed for your publicity?
 - ☐ Yes. (This could be a problem. Publicity has to meet deadlines, and more than two levels of approval will be very time consuming. You should discuss this issue with your supervisor.
 - ☐ No.
4. Can some approval levels be bypassed in an emergency?
 - ☐ Yes.
 - ☐ No. (This could be a problem. In an emergency, you have to respond quickly, or the media will get information from another source, perhaps your opposition. One level of approval is an obstacle, and more than one is impossible. Ideally, you should have full authority in an emergency situation. You should discuss this issue with your supervisor.)
5. Have you gotten agreement from your supervisor about your publicity priorities on Checklist 6?
 - ☐ Yes.
 - ☐ No, but I'll do that/keep trying.
6. Can you turn down a request for publicity, based on your publicity priorities, when you and your staff are overloaded?
 - ☐ Yes.
 - ☐ No. Reason: _____
7. Can you turn down a request for publicity when you believe there is no news peg involved and journalists won't be interested?
 - ☐ Yes.
 - ☐ No. Reason: _____
8. Do you have a clear channel to the top person in your organization, so you can get the information and approvals you need quickly?
 - ☐ Yes.
 - ☐ No. Reason: _____

Defining Your Authority

9. Are you involved in the marketing department's strategy sessions?

☐ Yes.

☐ No. Reason: _____

10. Make a list of the information you need to do your job. If the information you're getting is inadequate, write down the action you need to take to remedy the situation.

Information	From Department	Adequate	Inadequate	Action Needed	Action Taken
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Your supervisor's initials _____ Date _____

For related worksheets, see:

Checklist #6: Setting Publicity Priorities

Publicity Goals

Publicity is a tool to help your organization reach its goals. Being as specific as possible about your publicity objectives will produce the best results for your organization. This checklist is designed with two objectives in mind:

1. To give you an overview of your organization's publicity goals. Since these will change over time, you ought to review and revise this checklist on a regular basis. When you look back at prior versions of the checklist, you may be amazed to see the progress you have made in meeting goals since then.
2. To help you focus each publicity project and see where it fits into your overall publicity goals, use the completed checklist and circle the goal(s) for the project at hand in red pen.

Use the extra lines after each item to add any further information or your own comments. If you have different divisions or product lines with very different goals, you may want to fill out separate versions of this checklist for each.

☐ Date: _____

☐ Corporate Division: _____

☐ Product Line: _____

We need to (check all that apply):

☐ Inform people about how to choose, buy, and use our product or service.

☐ Persuade people to buy our product or service rather than the competitor's.

☐ Overcome resistance and convince people that they need our product or service.

☐ Counteract misconceptions about our product or service.

Publicity Goals

- ☐ Get more customers
 - ☐ to visit our stores.
 - ☐ to visit our dealers.
 - ☐ to buy our brand at retailers.
 - ☐ to order by phone.
 - ☐ to call for appointments with sales reps.
 - ☐ Other _____

- ☐ Counteract misconceptions about our
 - ☐ organization.
 - ☐ industry.
 - ☐ product.

- ☐ Inform the public about issues concerning our
 - ☐ organization.
 - ☐ industry.
 - ☐ product.

- ☐ Get people to vote for legislation that will help our organization.

- ☐ Get people to vote against legislation that will harm our organization.

- ☐ Attract shareholders and support our stock price.

Publicity Goals

- ☐ Protect our organization from frivolous lawsuits.

- ☐ Attract highly qualified

☐ employees.

☐ volunteers.

- ☐ Get people to attend an event or series of events.

- ☐ Increase attendance at or participation in our organization's programs.

For related worksheets, see:

Checklist #5: Using Misconceptions to Your Advantage

Checklist #6: Setting Publicity Priorities

Targeting Your Audience

It's important to define your audience as precisely as possible so you can choose the right media to reach them. This checklist will help you describe your target group. This group may vary from product to product or between divisions, so you may need to photocopy the checklist and fill out several versions. When you have identified your target audience, you can use media directories to find out which newspapers, magazines, and broadcasters will reach it. Since the audience for a product or service may change over time, you should review and revise this checklist periodically.

Date: _____

Project name: _____

Product/service/issue: _____

Appeals to:

- ☐ Broad, mass audience
- ☐ Highly specialized audience
- ☐ More than one audience (list below):

If you make a copy of this worksheet for each audience segment you have identified above, you will be able to target them more easily.

We need to reach this (these) audience(s) in the following geographic area(s):

- ☐ International (list countries):

- ☐ National