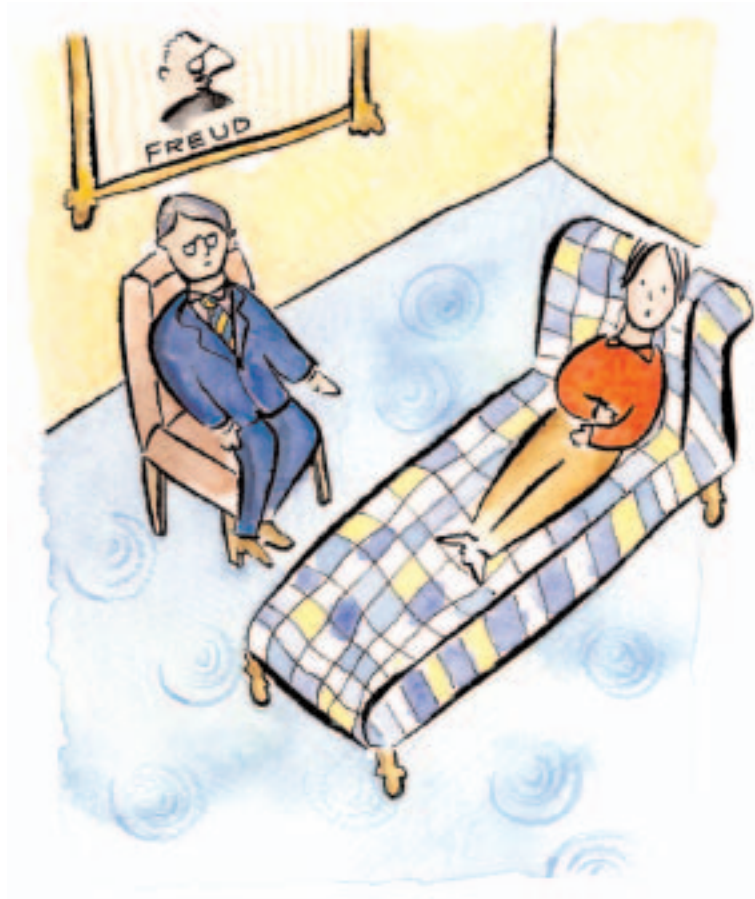


# How to make the most of working with your **marketing** and **communications** professionals



A practical guide for organizations out to make a difference.



"I don't know what happened. We seemed so close. And all of a sudden, I realized they didn't understand us at all, and they were ... **strangers.**"

# In communication campaigns, what you don't know **can** hurt you!

Ready to get some pragmatic advice on working with communications professionals? Great. But first, a caveat. This guide won't give you the do's and don'ts of developing an actual communications project. It WILL, though, explain how to find the right help for your job ... how to structure a relationship that protects your budget ... how to turn a paper-thin contract into a productive partnership and quality product ... and how to track success.

You're not alone. Plenty of non-profit decision-makers like yourself realize that public affairs and social marketing initiatives can be key to changing behavior and transforming policy. And they're smart enough to recognize they need professional help. But choosing the right help — consultants with the right skills, the right chemistry, and the right cost structure — isn't easy. And properly managing the involvement of consultants is a whole other challenge. Confusion can lead to costly surprises and hard lessons.

One of the big potholes in the road to solid communications is not knowing what you don't know. With a little help, though, you truly can pave the way to efforts that accomplish what you want, and get good value from the consultants you select.

This guide, based on research conducted by FoundationWorks, translates the real experience of non-profit professionals into easy, actionable guidelines for selecting and working with communications consultants — independents as well as full-service firms. Their years of hindsight become your foresight, so you can avoid missteps and confidently move towards success.



"How do we decide which PR firm to use— **they all look alike!**"

# How to meet your **best** match

## **First things first: what IS the job?**

No pressure, but your up-front thinking will set the course for absolutely everything that follows and how successful your efforts will be. Most importantly, realize that for a communications project to work, it must be part of a whole strategy. (If you're not clear on your strategy, you may want to use an outside consultant to help you determine or confirm the best route to your overall objectives, and the specific part communications should play.) If you decide you will need additional outside help, do early-stage research to determine the groups you have to influence for your project to be successful, the best way to reach them, and the actions you want your target audiences to take. And of course, you'll need to decide how much money you want to spend, and how you'll evaluate later whether it was well spent.

## **Narrowing the field from a billion possibilities.**

You can — and probably should — sketch out the type of communications help you need before you go any further. Limit your choices based on the disciplines your project needs (see "Who does it?"), its scale, and its scope. For example, is yours a single project or an ongoing effort? While you don't want to be working with a resource that doesn't have the expertise or skills you need, overkill can be as bad. A too-slick press conference can turn off audiences quickly, and at your expense.

## **When is your issue the issue?**

Most of the time, you'll be well served by choosing firms for their professional skills, rather their knowledge of your issue (you can bring good pros up to speed quickly). But if your message has narrow interest and your audience is particularly targeted, you might consider a communications firm that specializes in issues akin to yours. It may have ties to key media and innovative strategies for reaching your audience. Just be sure not to shortchange your project by selecting consultants on the basis of their support for your issue

rather than their professional ability. A consultant who sympathizes with and even understands your issue better than others may not have the skills to shape powerful messages and get them across. Realize, too, that you may benefit from consultants who specialize in serving non-profits, regardless of the issue. They'll know not to expect a tsunami budget — and still welcome your business.

## **The hunt is on.**

To develop a pool of prospects, you'll want to call anyone you know who's been involved in a communications effort and any organizations whose work you've admired. Find out which communications pros they worked with, what their experience was like, and what they would do in your position. Then, follow through. Take to the Internet to check up on any names you've received, and arrange meetings with firms that look promising.

## **And the winner is ...**

Come to meetings with candidates prepared to share information on your organization, your project, its target audiences, and your budget. Bring with you a written description, prepared in advanced, of what you really are looking for so every candidate is bidding on the same work. Look hard at each firm's portfolio, ask who did the work you like, speak with key firm members, get (and call) references. Look for conflicts of interest. Find out what the group's real strength is — as opposed to what it might call itself — and decide whether that is the strength you need. Be sure to ask the tough questions: who exactly will be working on your project and how important your business is to their firm. You don't want to be dazzled by a star performer only to have your account bumped to juniors. Conversely, don't be surprised if your consultants ask you who actually will represent your team and make the decisions. And throughout, be aware of intangibles. Style counts. So does chemistry. Make sure you're not only comfortable with the firm and its corporate culture, but with the individuals who will be working closely with you.

## Who does it?

A communications project may require a variety of disciplines. Services are available a la carte from independents and small "shops," or bundled together in larger, multi-service firms — which may handle all services in-house, or specialize in just a few and outsource the rest ... to independents! Disciplines include:

- Advertising
- Desktop publishing
- Direct marketing
- Evaluation
- Event planning
- Filmmaking
- Graphic design
- Illustration
- Legislative liaison
- Market research
- Media buying
- Media relations
- Photography
- Polling
- Power Point presentations
- Print production
- Social marketing
- Strategy development
- Videography
- Web site design/coding/support
- Webcasting/new media
- Writing

### INSIDE TIP:

A communications project that involves digital technology is primarily a communications project, secondarily a technology project. Don't be intimidated by the medium, and hand a new website or e-advertising to a techie. Rely on a communications professional to shape the message, look, and wording of the project, then hand it off (directly or indirectly via your communications pro) to a techie to translate it into code. You'll get a product that's higher quality and more consistent with your other communications.

## true tales:

### Undone by the unseen and unknown.

A non-profit decided to work with a large agency on a special event because of the agency's important connections. Unknown to the non-profit, the agency delegated the project to a special event management company. The agency's connections never played a role. One lesson — agency public affairs and special events services are not always integrated. Second lesson — choose agencies for the right reasons, confirmed before you sign.

### Your best match may not be what you imagined.

A researcher wanted to package and broadly publicize an important document, expecting that with the right packaging, wide exposure would follow. Fortunately, a good publicist recognized that the document was not mainstream news, and steered him away from the overkill of a large, full-service agency. Instead, the publicist produced — on a conservative budget — a successful op/ed strategy that targeted and reached the researcher's core audience.

### INSIDE TIP:

Non-profits produce a lot of reports — and assume the public is fascinated by each and every one. Not. The more specialized your reports, the more you'll benefit from an issue-specific publicist. The more general their appeal, the more reason to go with a PR professional. Remember to match the project with the appropriate expertise.



"Oh yes, I care deeply about algae and its effect on humanity. I could go on and on about it...for **\$250 an hour, of course.**"

# How to structure a deal that doesn't bite.

Now that you've selected your communications team, you'll want to structure agreements that preserve your budget and increase the chances you'll be pleased with what's produced.

## **The facts of life.**

What's the difference between non-profit professionals and communications professionals? Non-profits run on commitment. Communications professionals run on the clock. They're paid for their time, whether by the hour, day, month, or year. That's not to suggest your communications consultants don't care about your issue. They might. But they'll charge you for their efforts anyway. So always be careful what you ask for — and what you agree to. Make sure you're clear what you're asking for, and that you're understood.

## **Put it in writing.**

Regardless of the payment structure you select (see "Know your contract options"), it's important for you and your consultant to be explicit about what you expect and what they will deliver. Find out exactly how you will be billed, who will do what, when the work will be delivered, which responsibilities are yours, which responsibilities are the consultant's. Negotiate — or at least nail down — billing policies on travel time, markup and commission percentages (see **INSIDE TIP**), and interest charges on overdue balances. Also, if applicable, learn how many sets of revisions are included in your price, although good chemistry with your consultant can sometimes eke out more. No matter how painful, it's smart to budget plenty of time for early planning and interaction with your consultants. This will avoid time-consuming, budget-consuming revisions later.

## **You've got the power — to keep extra costs down.**

Even after your contract has been signed, costs can escalate. Whether they do or not is up to you. One example: off-loading new tasks. Although it's tempting to rely on the extra hands available from a consultant, off your plate probably means on your tab. You'll need to consider whether the convenience of ad hoc delegation of work is worth it. How and

when you review materials created for your project also can bring on extra costs. Other budget busters include lots of conference calls, 4-color versus 1-color print materials, and revisions at the eleventh hour. Also, be sure to review copy carefully along the way with everyone concerned (see "Getting to the finish line," next section.)

### **INSIDE TIP:**

Commissions are typically charged for media placement. The percentage sometimes can be negotiated against hours spent on your account. Be sure that waived commissions really are waived, rather than merely hidden, for example, in hours charged to non-specific tasks. The fact is, your media buyers' time has to be paid for somehow, and the cost of their services isn't going to disappear, even when your commissions are reduced.

### **INSIDE TIP:**

A photo can say a thousand words ... and cost plenty more. The key to photography costs is usage rights. When you pay for a photo — even one created specifically for your project — you pay for use in that one project only. More projects. More costs. Rights may expire after a year, so consider negotiating renewals at the outset. Realize, too, that you'll need to negotiate (and pay) for separate rights to use photos on the Internet.

### **INSIDE TIP:**

Even when brochures, databases, media lists, and other materials are created specifically for your project, your ownership of them is far from automatic. Before your project gets underway, you'll want to be explicit about which work products you own, and negotiate the costs of walking away with them. Make sure, too, that tech-based products and tools, such as software, websites, and e-versions of printed materials, are developed in a way that allows you to maintain them independently when the project is done and your consultant goes away. Self-maintenance often carries a cost, so be sure to include an estimated amount in your long-term budgeting.

## true tales:

### Clipped again.

A non-profit was clipping its own press coverage, but hired a separate firm to track publications overall. Without offering or being authorized to do so, the firm produced a clipbook that contained half the non-profit's own clips — and charged the non-profit for the whole amount. Lesson? Be really clear about what you want your consultants to do — and not do.

### Thanks for your account, here's the bill.

An advertising agency went to great lengths to get a non-profit's business. Then, the agency front-loaded the non-profit's bills to recover its "business acquisition" costs. Sometimes these charges are identified, sometimes hidden in other up-front charges. Remember, you rarely get something for nothing, so when promotional premiums and even speculative creative work come your way before you sign, ask if they'll cost you after you sign!

## Know your contract options.

Communications professionals, depending on their size and discipline, offer a number of ways to structure payments. Regardless of the arrangement you agree to, expenses are always extra and frequently marked up — ask how much.

- **Project fee.**

This approach at least partially sets your costs before a specific project gets underway. Be sure you know the extent to which the consultant's services and expenses are covered, and what extras might be tacked on at the end.

- **Hourly charges.**

This may be appropriate for piecemeal assistance, such as a meeting with consultants. Because hourly rates within an organization can vary greatly, be sure you know exactly whose work you're paying for and at what rate.

- **Monthly/Yearly Budget.**

Sometimes called a retainer (see below), this approach divides the estimated number of hours your account will require over the year by 12. Charges for hours that exceed this amount in any given month are tacked onto the next month or quarter (with prior notification, if you ask, that you're about to go over your limit). However, a month's unused hours are never reimbursed. Again, because hourly rates differ, you will want to know who is doing your work and at what rate it is being charged against your budget. Most organizations billing on this basis are not likely to track and report voluntarily the number of hours a specific worker devotes to your project — so if this is important to you, specify it. Confused? That's a primary drawback of this complex, hard-to-monitor method. Think of it as more a payment plan than a pay-down account, and especially imprecise when your workload is likely to last less than a year.

- **Retainer fee.**

With this approach, you pay a flat fee billed in advance each month for the availability of the consultant. Expect to pay this amount whether you use the consultant's services or not. In fact, some services — when called upon — may be charged over and above the flat fee.

- **Pro bono.**

Music to every non-profit's ears! Remember, though, that even though your consultant has agreed to provide services free of cost, you still have to pay for expenses, such as travel, printing, and materials.



"I guess I prefer the old fashioned way. You know, you do the work, **I get to look good.**"

# How to be your project's own **best friend.**

After you and your consultants have your relationships formalized in a written agreement, consider how you'll manage the unwritten part of your relationship. The things you do and say can make a big difference in consultant performance and project results .

## **Output is only as good as input.**

Good communications are based on ... good communications. For quality work that accomplishes what you want, initiate and maintain a comprehensive dialog with your consultants. Even before their work begins, give them a full briefing on your organization and its prior experience with communications efforts. What is your organization's history? What are its goals? What initiatives have worked, and which have tanked? Plus, be open to being challenged. Your consultants may recommend additional research to guide their efforts — even help you find the funding to make the research feasible. And if you need input or approval from your Board, be sure to get it early on or it may cost you.

## **Let your consultant be the first to know.**

Things happen. One of your top executives quits. An editorial appears that blasts or boosts your positions. A vote vital to your cause finally takes place. Events can have a profound impact on your messaging. So you can't afford to assume your consultants are aware of them. Make it your responsibility to keep your consultants informed, and include them in decisions on whether and how any development should impact the direction of your communications.

## **Good partnerships for better communications.**

Cultivating a productive, positive relationship with your consultants can only improve the quality of their work. Consider the perks that your organization is in a position to offer (see "Engaging ideas"). Those that draw consultants inside your organization and its activities will help your professionals identify more closely with your goals. In fact, anything you can do to make their workdays easier and more fun will be welcome. For consultants working on a pro bono basis, try to come up with

discounts or services they might appreciate — and that demonstrate your appreciation of them. Pay just as much attention to avoiding negatives. Don't impose. Don't expect consultants to buy a table at a benefit. Don't expect them to come to a rally. Outside consultants are just that — outside, and not part of your organizational family.

## **Remember, you're not your audience.**

As your initiative is developing, you'll be asked to review and evaluate it. This is the time to remember — it's not about you. Or your colleagues. Or your family members. Your efforts are aimed at a specific target audience. The question, the only question, is how will your audience respond. Truly, what your office-mates don't like about a single ad or a whole campaign may actually make it perfect! If you don't think you're qualified to jump into your audience's mindset, consider a pre-launch focus group. Or simply rely on your consultants' recommendations. After all, you hired your consultants because they're experts in communications — an established discipline backed with knowledge, theory, and practice. You'd do well to "buy" what you're paying for.

## **Getting to the finish line.**

With strategy, concepts, and direction for materials approved, you'll need to review specifics, such as supporting text and design elements. To control the revision process — and avoid extra costs — be sure all those who need to sign off on work are involved at early stages, so everyone shares the same expectations. Also, consolidate comments from your entire team before they're passed onward, so your consultant's response can be efficient and on-target. Success, according to plan, should be straight ahead.

## Engaging ideas

There's plenty you can do to engage your consultants in your organization, to increase their understanding and enthusiasm for your issues. Here are just a few ...

- Give them a free corporate membership
- Offer them free tours of any interesting facilities associated with your group
- Offer them a free table at one of your events
- Send them posters for their office walls
- Invite them to screenings or previews of films related to your issue

### INSIDE TIP:

Conduct regular status calls throughout a project's life-cycle to review scope, progress, or changes in approach or schedule. Keep notes. They can come in handy for reports (and resolving disputes!).

### INSIDE TIP:

You have to pay for your consultants' work anyway, even if you hate it — so keep the lines of communication open throughout the process so you get the quality work product you expect. Limit the risk of off-track work by advising your professionals at the start of any mandates, such as demographic groups to be shown or not shown, or words to be mentioned or avoided. When their work is presented, take a deep breath. Because communication is both art and science, work product is wide open to subjective reaction. Really, it doesn't matter if you don't like how something looks as long as your target audiences respond.

## true tales:

It's smart to know more.

A non-profit sought funding from a foundation to create a campaign that would change consumer behavior. Instead of moving forward on the basis of the key messages the non-profit already had developed, the foundation advised the grantee to confirm its key messages were on target. Did they really know what they thought they knew? What didn't they know they didn't know? The foundation helped the non-profit find and fund a professional polling firm to do the recommended research. Then, the foundation helped the non-profit find a quality PR firm that could — and did — develop a highly successful campaign based on research findings.

Pretty is as pretty does.

A non-profit hired an advertising firm to create ads that would sell only the concept of an ad campaign to board members. The ad group was hired with the understanding that if the board bought the idea of a campaign, the firm would execute it. Although the non-profit was clear in its directives, the firm's creative work was a disaster. The advertising firm, it turned out, was really a design studio. Its spec ads looked terrific, but didn't communicate or convince. The non-profit, of course, paid for the firm's work, but moved on to another source to develop the ads that followed later. Among the many lessons here, sometimes the best way to deal with a relationship is to terminate it and move on.



**"Of course our illiteracy outreach campaign was a success.  
Just look at all those press clips!"**

# How to track success.

From the outset, know what will define project success — and find ways to track accomplishments.

## Know your limits.

Assessments of non-profit communications can be a tricky business. You may not be able to get proof of an effort's effectiveness immediately after it ends. In fact, it might take years for attitudes to shift, and impossible to learn whether any particular element played a role. Also, any initiative is ideally part of a larger, holistic strategy. And within the initiative, no single ad or brochure will solve a problem. How do you measure the impact of individual tactics? It's frustrating. But know that every bit of hard knowledge you can get about your communications' performance will help guide future efforts, not only of your organization but also other non-profits. After-the-fact insight can help all of us make better use of our resources and, through effective communications, create the change we seek.

## Begin at the beginning.

Even before your initiative gets off the ground, you'll want to have some idea of how and whether your success will be measured — and maybe even have some benchmark measures in place. How will you determine whether tasks were completed? How will you gauge whether objectives were met? More challenging, how will you detect and be able to report any shifts in attitudes or behaviors as a result of your efforts? Paint a picture of what project success will look like, and share it with your consultants early on. Their understanding of what success means to you (e.g., increased website hits) will affect the final work product (e.g., communications that highlight your website address). Also, by focusing on success indicators at early stages, you may discover gaps in your overall strategy. You may realize you need to clarify your goals better, or put more resources into research — corrections best made earlier than later.

## The budget tradeoff.

It's an inevitable and unsolvable quandary: the more resources you put into measuring the impact of communications, the less you can put into the communications themselves. Decisions on where to draw the line are always a compromise. Some initiatives are sufficiently small-scaled

## true tales:

- **Once, twice, three times a winner.**  
A campaign to encourage safe locked storage of guns measured behaviors three times: pre-campaign, half-way through the campaign, and at the end of the campaign. Target audience surveys revealed — and documented — that gun owners in fact did change their behavior, with the number of gun owners keeping their guns under lock and key rising from 38% to 58% from campaign's start to finish. Attitudes also had changed; after the campaign, more gun owners felt it important to lock up guns in their households.\*

- **Local Hero makes good.**  
A campaign to convince Western Massachusetts stores to promote local produce turned out to be anything but a lemon. Based on solid research, the "Be a Local Hero" campaign achieved tremendous 70% awareness, and also rang up success at the cash register. Approximately 40% of people who were aware of the campaign changed their behavior and started to buy local produce. In addition, more stores and big chains began stocking it.

\* Harvard Family Research Project's *Lessons in Evaluating Communications Campaigns: Five Case Studies*, 2003. Julia Coffman

that your only choice is subjective measures. But know too that some tracking techniques are less expensive than others. And they may provide sufficient insight that they're worth the money. Take a look at "Tools of the trade" to see some of your options, but don't be afraid to develop some of your own. Be innovative. Develop or adjust techniques to your project and your goals.

### **Quality vs. quantity.**

Regardless of the type of quantitative data you're acquiring — whether it's news clips, public opinion data, awareness figures, or other data — keep your eye on the qualitative ball. Success isn't just a matter of how many news clips, but where those clips appeared and what they said; that is, the likelihood your primary target audience will have seen the coverage and been influenced by it. Similarly, awareness figures only matter if the people who have been made aware of an issue are in a position to be affected by your message or do anything about it. And what's the value if gathering data-bits of opinion from people outside your target universe? Just be sure your monitoring activities relate to what your communications and your organization want to accomplish, and that you focus on the impact rather than the extent of the media exposure you achieve.

### **The added value of secondary targets.**

Before you finalize your assessment strategy and budget, consider any secondary objectives your project may help you achieve. For example, your communications may reach — and sway — potential donors as well as your prime target audience. Or, by taking the lead on an issue, you might impress existing donors and board members as well as decision-makers. If these secondary audiences are a factor for you, you'll want to track coverage in media these individuals are likely to notice. Think of it as value-added exposure, and possibly consider at least a portion of your overall costs an investment in board relations and future, greater funding.

#### **INSIDE TIP:**

Consultants can train your own staff to conduct rolling surveys — a money-saving way to get data that informs your ongoing communications strategy and your entire operations.

#### **INSIDE TIP:**

By conducting surveys before, during, and after an initiative, you can (at least roughly!) track changes in awareness, understanding, and attitudes. Just be realistic regarding how far the needle is likely to move. A little change could represent big progress.

# know what works.

There are a number of techniques you may want to consider, depending on your tracking objectives and budget.

- **Focus groups.**

Focus group presentations and interviews give a small sampling of your target audience a chance to react to messages and materials before they are finalized to make sure your approach will work. You can learn, for example, whether the audience understood your points and found them persuasive. A variation on the traditional 10-person, two-hour focus group is to use two facilitators, and have each of them expose three people to creative work for about 30 minutes, thereby getting the valuable reactions of about 30 people in a single night.

- **Data sampling and surveys.**

Surveys of general or specific population groups, or key informants such as policymakers can be conducted before, during, and after an initiative to detect shifts in attitude or behavior. If your project materials have sufficient exposure, more frequent rolling sample surveys can give you real-time information on the effectiveness of your efforts, and make it possible to fine-tune them while they're in process.

- **Media tracking.**

Although quantitative and qualitative analysis of news coverage won't measure your effort's effectiveness in changing attitudes or behaviors, it will measure effectiveness in building awareness. You also will get excellent insights into whether and how well your message is being picked up by key reporters.

- **PSA valuations.**

Track how many PSA placements were picked up, multiply it against standard commercial rates, and you'll be able to assign a dollar value to your efforts.

- **End-result data.**

Depending on what your communications are trying to accomplish, you may be able to get hard effectiveness measures via sales figures, increase in the number of issue partners, influence on an important decision, membership growth, etc.

- **Agency performance.**

Task-related post-mortems help everyone do better. Track — along with your agency — how well it has worked against budget, schedule, and quality measures.

**Feel better prepared?  
Then go bravely forth  
with your upcoming  
projects. Follow our  
guidelines for making  
the most of your commu-  
nications professionals.  
And may all your "True  
Tales" be successful ones!**

## A few More Thoughts

If you're inspired to learn more about working with communications consultants, here are some other resources:

American Association of Advertising Agencies  
[www.aaaagencysearch.com](http://www.aaaagencysearch.com)

The Foundation Center  
[fdncenter.org/learn/useraids/consult.html](http://fdncenter.org/learn/useraids/consult.html)

The Public Relations Society of America  
[www.counselorsacademy.org/index.cfm?page=dynamic&name=FindConsultant&menu=find](http://www.counselorsacademy.org/index.cfm?page=dynamic&name=FindConsultant&menu=find)

The Spin Project  
[www.spinproject.org/resources/pr\\_consultants/hire.html](http://www.spinproject.org/resources/pr_consultants/hire.html)

If you think you need additional help, feel free to contact us, FoundationWorks, at [www.foundationworks.org](http://www.foundationworks.org). FoundationWorks is an organization devoted to helping foundations and their grantees make more effective use of philanthropic resources to accelerate social change. You're invited to check out our survey findings about typical barriers that organizations encounter with communications projects, posted on our website, and the services we offer to help break through those barriers.

## Thanks...

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