

CLIENT MEETING QUESTIONS AND NOTES

WORKING WITH REAL CLIENTS

Creating a Campaign for a Class

Public Relations campaigns classes have been part of curriculum for more than 80 years at college programs through the United States and abroad. Many of these courses were taught as a survey of ideas or examination of case studies reviewing successful campaigns completed by agencies and corporate teams.

Even PR practitioners who are internal to a corporation must still have a *client meeting* with the department or group with whom they are partnering to create a campaign. Before anyone can start to identify the issue, create a goal statement, craft objectives, outline a research plan and examine the target audience, everything begins with the initial client meetings. Externally, agencies use this initial meeting to cover a lot of ground, not just to review the elements of the campaign, but also to delve into the company through a situation analysis and more.

Meeting with the client and/or department is part of a two-way communication model in that the agency or company team has to provide a sense of professionalism and knowledge to earn the trust of the client and/or department. The internal and external piece is an important step and an essential skill to master and fine-tune no matter how many campaigns a person has completed.

Setting Up the Meeting

It is important to set the ground rules before the meeting begins. The agency and/or company team must be clear to set a baseline for how communication will flow, how and when decisions are made and how questions are asked and answered. The first two meetings should alternate between locations where the company and the team share information and resources.

It is best to have a meeting when all parties are ready to discuss the project, in the right mindset and ready to begin moving forward. It is important for the company to understand that the campaign is a complex project with many moving parts, which means that the development of the plan is only as strong as the information that is contributed by the client, company, or department and the needs that are communicated. This process of initial discussions must be open and honest. Ethically, the team and/or agency should be clear in their

explanation that while they can create a comprehensive campaign with research to support their decisions, it is up to the public to interact and react with the messaging and the client, company, or department to follow the plan and not deviate or add any additional elements (like a crisis).

Ethics in Public Relations

Ethics are defined as the moral base that governs a person's behaviors and/or the ways in which a person makes decisions and takes action. Within the field of Public Relations, a practitioner must apply their own person ethics within their decision-making process. Additionally, a practitioner must take into account the ethics of their company if they work for an agency and most important, they must consider the ethics of the client. I suggest at this stage that it is imperative to have an important conversation with your client about their values and their ethics. Many times, a company has an ethical standard or practices if it interacts with the public in any way.

Ethics are interpreted loosely and because each person has their own set of ethics, it is challenging to find a common ground when people approach the conversation from a broad approach. I suggest the best way to approach a rational and productive discussion on setting your own code of ethics for the project is to begin with the very basic elements that impact most communication projects such as use of imagery, use of shared information, historic documentation, attribution and credit and more. It's not uncommon to then incorporate the code of ethics or ethical standards from the company.

Example: An organization that works with children might have a standard of ethics that includes that all adults working in direct contact with children are subjected to a background check and annual mandatory training. Additionally, the code of ethics might dictate that parents only pickup their only children and follow similar standards to schools.

The Public Relations Society of America (PRSA) offers members a set of professional guidelines and code of ethics to follow in their professional career. The International Public Relations Association (IPRA) offers members a code of conduct that guides their professional actions and offers clarity of actions. Both the PRSA and IPRA codes are seen as core guidelines in the PR field and are used as guidelines for professionals as well as taught in college courses.

THE INTERNATIONAL PUBLIC RELATIONS ASSOCIATION CODE OF CONDUCT

The IPRA Code of Conduct

Adopted in 2011, the IPRA Code of Conduct is an affirmation of professional and ethical conduct by members of the International Public Relations Association and recommended to public relations practitioners worldwide.

In the conduct of public relations practitioners shall:

1. Observance
Observe the principles of the UN Charter and the Universal Declaration of Human Rights;

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| <p>2. Integrity
Act with honesty and integrity at all times so as to secure and retain the confidence of those with whom the practitioner comes into contact;</p> <p>3. Dialogue
Seek to establish the moral, cultural and intellectual conditions for dialogue, and recognize the rights of all parties involved to state their case and express their views;</p> <p>4. Transparency
Be open and transparent in declaring their name, organization and the interest they represent;</p> <p>5. Conflict
Avoid any professional conflicts of interest and to disclose such conflicts to affected parties when they occur;</p> <p>6. Confidentiality
Honor confidential information provided to them;</p> <p>7. Accuracy
Take all reasonable steps to ensure the truth and accuracy of all information provided;</p> <p>8. Falsehood
Make every effort to not intentionally disseminate false or misleading information, exercise proper care to avoid doing so unintentionally and correct any such act promptly;</p> <p>9. Deception
Not obtain information by deceptive or dishonest means;</p> <p>10. Disclosure
Not create or use any organization to serve an announced cause but which actually serves an undisclosed interest;</p> | <p>11. Profit
Not sell for profit to third parties copies of documents obtained from public authorities;</p> <p>12. Remuneration
Whilst providing professional services, not accept any form of payment in connection with those services from anyone other than the principal;</p> <p>13. Inducement
Neither directly nor indirectly offer nor give any financial or other inducement to public representatives or the media, or other stakeholders;</p> <p>14. Influence
Neither propose nor undertake any action which would constitute an improper influence on public representatives, the media, or other stakeholders;</p> <p>15. Competitors
Not intentionally injure the professional reputation of another practitioner;</p> <p>16. Poaching
Not seek to secure another practitioner's client by deceptive means;</p> <p>17. Employment
When employing personnel from public authorities or competitors take care to follow the rules and confidentiality requirements of those organizations;</p> <p>18. Colleagues
Observe this Code with respect to fellow IPRA members and public relations practitioners worldwide.</p> <p>IPRA members shall, in upholding this Code, agree to abide by and help enforce the disciplinary procedures of the International Public Relations Association in regard to any breach of this Code.</p> |
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Credit: By kind permission of the International Public Relations Association. www.ipra.org IPRA — leading trust and ethics in global communication

Taking Notes

Many young people take notes based on their days in classrooms. These notes are very different than the notes needed to detail the happenings of business meetings. Best practice in running a meeting is to start with an agenda; this provides structure to the meeting and hopefully prevents derailment. The notes should be organized to parallel the agenda, utilizing the same bullet points, levels and order.

One person per team should be designated to take notes. Within each section, the note-taker should be careful to make a list of action items and *assign* any follow-up tasks. The most efficient way to do this is by using initials in the notes. Be careful if multiple people are taking notes from computers using Google Docs or another shared system that the people don't write over each other and so on.

Notes should not only be about what is said in the meeting, but other observations as well. If there is a team of people present, designate another person to take paper notes or computer notes on any other observations such as body language, facial expressions, changes in breathing, eye contact and more. These observations can often lead to a deeper understanding of the greater issues and more.

Asking the Right Questions

During the first and second meeting between the client, company, or department and the team, it is best practice to create a list of questions prior to starting and putting the answers to those questions next to what is proposed. As the meeting progresses, there may be a number of questions that will go unanswered.

Preface questions about their personal view of the company by using terms such as *from your viewpoint* or *based on your perspective* and then ask the question. Many times, if you come right out and ask, "What do you think is the issue?" there might not be a clear answer from the entire team. On the other hand, the bid for the project may have included the issue, but that is as far as the client, company, or department got and did not go beyond.

Good Questions:

- Can you share with us some examples of campaigns or plans that have, in your opinion, been successful at reaching your target audience, delivering the message and getting them to activate? Please explain why your team believes this was a success.
- Can you share with us some examples of campaigns or plans that have, in your opinion, been unsuccessful at reaching your target audience, delivering the message and getting them to activate? Please explain why your team believes they were not a success.
- How does the company and/or department believe it is perceived within the community and the public?

Bad Questions:

- How would you solve this problem?
- What would you like to repeat?
- Why did you stop working with other companies?
- Why aren't you successful?

Answering the Right Questions

When the client, company, or department asks questions of the campaigns team, it is important for the team to be honest and ethical, which means not overselling or promising to deliver what you are unable to do. Since it is difficult to gauge what types

of questions you might be asked, you have to prepare the team for any type of question that might arise.

Good Answers:

- The campaign plan our team prepares includes a calendar of when to deploy the tactics and the evaluations and measurements to ensure that each of the tactics provided are successful.
- The PR campaign for your client, company, or department is aimed at the target audience and has messaging tailored specifically to this audience.
- The execution of the campaign is in the hands of both the client, company, or department and the campaign team. In teamwork, both sides have to contribute to make the campaign a success.

Bad Answers:

- The campaign team did our part, now it's up to you so; if it fails, it's your fault.
- The content is good; maybe the audience just doesn't get it or like the client, company, or department.

- What are some meaningful words or phrases the audiences responds to?

- Does the client, company, or department understand their situation analysis?

- Does the client, company, or department already speak to the target audience?

- Historically, how has the client, company, or department handled a crisis?

- Does the company have a solid plan for handling conflict before it becomes a crisis?

- What audiences does the client, company, or department miss?

WORKSHEET 2B

ETHICAL STANDARDS

ORGANIZATION'S CODE OF ETHICS:

What other ethical standards are important to the organization?

What are your OWN personal ethical standards?

Ethically, how do you feel about the following;

- Using images off the internet?
- Using images off of social media?
- Using information off the internet?
- Using information off social media?
- Assigning proper credit or attribution to contributors and/or creators?
- Interaction on social media?
- Cooperation with partners? Sharing information?

Add your own here:
