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THE
COMMUNICATIONS
CONSULTANT'S
MASTER PLAN

**LEVERAGING PUBLIC RELATIONS
EXPERTISE FOR CLIENT AND
PERSONAL SUCCESS**

ROGER DARNELL

ROUTLEDGE


“Having spent the past 25 years pursuing excellence in high technology industries, focusing on business development, strategic planning, venture growth, and scaling operations, being proactive in messaging and managing PR is absolutely a key success factor for all entrepreneurs and company executives. As an integral PR partner in a large-scale investment I led over 20 years ago, Roger’s subject matter expertise is highly qualified.”

Chris Arsenault, *Managing Partner, Inovia Capital*

“*The Communications Consultant’s Master Plan* provides a solid bedrock for anyone getting into PR, particularly those starting their own agency. Roger has covered the bases in a way that’s truly impressive. I wish this was around when I got started!”

Anthony Vagnoni, *President, Avagnoni Communications*

“A new epoch is here. It’s time to make authentic, bold moves and manifest new realities. If you’re serious about taking your career to the next level, Roger Darnell’s expertise will guide you with vibrant light, illuminating your practice and revealing that it’s so much more than PR – it’s an experiential journey of breakthroughs and discoveries. Roger not only shows you the way, but he also goes there with you.”

Jason White, *Experiential Director;*
former Co-Founder and Chief Creative Officer, Leviathan

“Think of *The Communications Consultant’s Master Plan* as a kind of hardware store for just about anyone seeking to get anyone else to buy or believe something. It’s a comprehensive guide offering valuable nuts-and-bolts advice, assistance and support in realms such as public relations and investor relations. Especially useful are the action items offered after each chapter.”

Stuart Elliott, *Panel Moderator/Speaker;*
former New York Times Advertising Columnist

“For PR, marketing or communications professionals considering taking that first step into running a firm of their own, Roger Darnell offers a step-by-step, how-to guide from his nearly three-decade career serving as PR counsel for some of the nation’s most

well-known creative agencies. Full of real-world business lessons and high-level overviews of successful campaign strategies for different types of business clients, Roger provides the blueprint of success for the enterprising independent PR and communications professional to build a business that achieves professional rewards and personal freedom beyond what most traditional employees ever achieve. If success is a journey, and not just a destination, Roger makes for an engaging travel companion when you're ready to branch out on your own."

G. Scott Shaw, *President and Founder, Everclear Marketing, Inc.*

"Years ago, I set out to only work with the best of the best, and Roger Darnell epitomizes that standard. As Chief PR Counsel for Cutters Studios since 2014, his impact on our organization's success is beyond measure. Roger is a true partner in every sense of the word. He really takes the time to get to know the culture and the spirit of the companies he represents. Roger's unique approach and clear strategy have been a guiding light for our company. He has become a part of us, and I can't imagine where we would be without him. For anyone wanting to know how to build similar expertise and apply it to allow themselves and everyone around them to soar, I have one suggestion: Read this book."

Craig Duncan, *President/Managing Director, Cutters Studios*

"After more than 20 years as a professional colleague and friend, I've admired how Roger continues to adapt and apply his expertise to the evolutions in technology and media that drive new approaches to public relations. His kindness, integrity and approachability are key to his professional success, and also key to what makes *The Communications Consultant's Master Plan* so helpful. With this book and its Explorations, Roger shares practical ideas and best practices for implementing a public relations strategy to help elevate any new business initiative or career path."

Karen Raz, *Owner, Raz Public Relations*

"Rich in details and comprehensive in scope, Roger Darnell provides beginning and seasoned professionals with everything they need to know for a successful career in the communications business."

Rebecca Bedrossian, *Global Content Director, Wunderman Thompson*

“In *The Communications Consultant’s Master Plan*, Roger expertly breaks down the knowledge needed to build a PR business from the ground up, with both in-depth details on everything from writing contracts to finding new clients, in an engaging, friendly tone that makes this handbook approachable, informative and a joy to read. After diving into everything Roger has done so far in his career, I can’t wait to see what he has planned for next.”

Jacqueline Poole, *Senior Editor,
Manager of Social Programs, Patrick Faller Media*

“This is a well-rounded, heart-filled reference from an innate communications expert who understands the key to this business – community itself.”

Angela Natividad, *Co-Founder, Hurrah Group;
Editor, L’Atelier BNP Paribas; Writer; Advisor*

“Who would have thought that great communications were so deeply rooted in the strategy and fabric of the target organization? Answer: Everyone who is great at it! Darnell has revealed where his magical body of work has come from – it comes from that systemic understanding of the organizations he is communicating about. We are lucky to have him share with us the wisdom he has gained and his ‘tricks of the trade.’ Thanks for making it easier to follow in your footsteps!”

Brett Knowles, *CEO, www.Hirebook.com*

“At all SHOOT platforms, Roger Darnell is well known as a top-tier PR pro. The many attributes that set him and his work apart certainly add up to the great benefit of his clients. This book is a viable means for training a new generation of highly skilled, independent communicators, and for entrepreneurs to see why adding professional PR counsel is a key to succeeding at the highest level.”

Gerald Giannone, *Co-Owner, DCA Business Media LLC*

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My Story

It is a great honor for me to lead you on this voyage of specialized business education, based on a career trajectory that has been extremely fun and rewarding. Not so long ago, I was starting out, and since then, I have learned that every person and opportunity met along the way can absolutely transform the world. Since we are still strangers, here is a quick tour of some of the experiences illuminated in this book to help light the way for you.

As a high school student, I had earned good grades and demonstrated enough aptitude that college seemed like a sure thing. I gambled on winning a four-year Air Force Reserve Officer Training Corps scholarship that did not materialize and found myself entering the work force with no clear pathway forward. Still, the Air Force’s powerful campaign urging everyone to “Aim High” pulled me in; as a Reservist, I got the leg up I needed to begin studying at the University of Central Florida.

By the time I graduated from UCF, I was intent on using the positive feedback I had earned as a writer to make my mark in the world of motion pictures. Two amazing openings occurred right away. First, as a VIP tour guide for the grand opening of Universal Studios Florida (USF), I was briefly allowed to step into the realm of Hollywood moguls and celebrities. I also earned a part-time job writing press releases for the impressive post-production business Century III, which made its home at USF.

Despite landing some potential game-changing developments in filmmaking and screenwriting, the results of my post-college efforts to land a starring role in “the industry” fell short. So, I applied myself freelancing – including word-processing work for defense contractors – and eventually, using the writing and photojournalist skills I had sharpened through my Air Force Reserve training, I started placing some nonfiction articles in trade publications. I also submitted a lot of creative writing to prominent literary reviews,

scoring a few placements and starting to understand what it meant to succeed as a professional writer.

With experience and determination, better prospects began arising. While the video scripts I wrote for major clients paid the bills, it was my technical writing skills – and my interest in film – that opened the most exciting doors. Between 1994 and 1997, I found work as a network TV script coordinator for HBO and others. That momentum led my wife and me to relocate to Los Angeles.

Even with lots of connections at the top of both the feature film and TV industries, success in screenwriting still eluded me. Still, 24 months of employment in LA gave my career a solid boost. It was the Century III experience, and my success writing articles for industry trade publications, that helped me land my first job on the West Coast. From there, I was the director of marketing for a creative production company in the promo space, which led to a career-opening position as an account executive for high-tech PR firm The Terpin Group (TTG).

At that point, I was no longer pining away for a career in the movies, for a few key reasons. First, I had learned that the production industry demands most of one's time – 14-hour days and six-day work weeks are standard. Being part of the crew on episodic TV series taught me a lot about my work preferences. At TTG, I earned good money working regular hours ... but I also saw the difference between what the agency billed and what I was paid. So, after learning all the PR agency ropes over the span of about seven months, I was able to launch The Darnell Works Agency (DWA) and immediately double my income, while working from home.

This was an amazing turn of events for me. Once again, it became extra meaningful due to my focus on film and TV, and the people in my life at that time. One of my colleagues at TTG recommended me for an account she had previously handled. This became my first account in the commercial advertising industry. The client group was extraordinary, and it was essential in demonstrating my capabilities at the highest level. In other words, it was a perfect fit, and it set me on the path of independent success.

Within a year of launching DWA, my wife and I made another big move, leaving LA for the mountains of North Carolina and starting a family. At the time of our departure, my business was thriving. What would be the impact of leaving that dream factory for a small college town in the Appalachian Mountains? In short, we have come through several massive economic

downturns, the unmeasurable upheaval of 9/11, and a global pandemic, in excellent shape.

At the beginning of my career journey, finding work was not easy, nor was it often fun or rewarding. It was certain to require me going to work at some location, doing my job according to a schedule set by my boss, and hoping that things would go well, that I would have some job security, and maybe some perks, eventually. The dreams of working from home, living in my choice location, earning over U.S. \$100 per hour, and being able to pick and choose clients were beyond my reach. How in the world could I ever make them a reality?

This book is here to explain how I was able to achieve all these seemingly far-fetched aspirations. If you have similar career aims, read on. With diligence, we are going to elevate your journey.

As I am writing this and savoring the latest experiences, including everything I have learned to help you design and construct your Master Plan, I am keenly aware of a new level of achievement. The success of my business is now allowing me to dig back into those earlier career aspirations that were more personal, which I have previously been unable to prioritize due to needing to hustle to secure my and my family's financial needs. This book is one measure of the type of reward that can come from following my lead. For the first time in many years, screenwriting is also back on my agenda.

For me, the lesson seems to be this: Do great work for others and commit to it 100%. When things align and you have the security you desire, by systematically expanding your focus to address your own objectives, dreams can come true. It will take time and disciplined focus, no doubt... but thankfully, this journey is extremely rewarding.

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Winning and Managing PR Accounts

As we begin this new journey together, you already have some knowledge of the educational and life experiences which led to me becoming an account executive at the successful public relations firm The Terpin Group (TTG). That career-changing development took place in 1999, when TTG had offices in Los Angeles, San Francisco, and New York. In this book's introduction, I also mentioned some of the business intricacies I have homed in on – including philosophical and practical discussions – to better understand how, when, where, and why the steady application of sound communications practices can radically alter careers and enterprises. If you have read *The Communications Consultant's Foundation*, you possess an excellent working knowledge of vital concepts including brands, branding, creativity, leadership, strategy, objectives, integrated marketing, business development, profitability, and project management. The question is, can you convince another business owner that you are the perfect candidate to help them add professional communications capabilities to their operation, and then fill that tall order?

Yes, you can, if you have been actively participating in incorporating what I have shared, building your brand, embracing the challenges presented and preparing yourself to be a proactive, strategic communicator dedicated to exceeding your clients' expectations. Winning the first account is likely to be the hardest, but if all goes well, that achievement will ignite a chain reaction. Let's take a moment to fully assess the phenomenal foundation you now stand upon.

1. You are a proactive communications leader dedicated to the success of yourself and others, guided by one or more codes of ethics.
2. You embrace the importance of creativity, problem solving – and innovative approaches to problem finding.

3. You are committed to ongoing learning, and to strategic planning on a regular basis.
4. You are always ready to position yourself as the ideal candidate according to your core strengths, and to demonstrate your expertise.
5. You have a solid brand identity and open communications channels, and you can guide others in thoughtfully developing their own personal and business brands, and their strategic promotional campaigns.
6. You are the proprietor of your own business consultancy, and you have a Leadership Brand that fits your objectives.¹
7. You are increasing your strengths in all facets of the key skill set for a communications consultant.
8. You can explain how you can make a strategically sound impact on a client's business objectives over time – and intelligently use media assets to maximize impact in its storytelling initiatives.
9. You have one or more case study to demonstrate your expertise in action.
10. Your understanding of the continuous customer journey, business development, strategy, and other essentials of business – including project management – positions you to focus on the right tactics to serve your clients' business objectives strategically, starting immediately.

The Initial Interview

Moving forward based on our common understanding of business development, customer service, and integrated marketing in action, attracting and retaining customers is a nuanced science unto itself. I have found success in navigating this vast terrain by focusing on objectives – mine and those of my clients. If they are calling you, someone at that company has identified a need that has been deemed important, and most likely, there is strong interest in addressing it starting very soon. Your goal, then, is to listen well enough to fully understand the nature of that need. From there, the challenge is to convince the caller that you are the best person to guide them forward, and to establish an agreement that will make you a leader in addressing their needs.

Whether the initial interview happens in person or by phone, this interaction is a test to determine your worthiness for an assignment. The simple way of looking at this is your potential client has some needs, and they want to explain those to you and then determine if they feel confident in your ability to address them to their satisfaction. Whenever the phone rings or an email query arrives, my response is usually to the point: (1) Thank you very much for thinking of me; (2) let's set up a call to discuss this in more detail; and (3) let's exchange emails and set a date and time for the call.

Before the interview takes place, I find the time to connect with those who have reached out on LinkedIn, and I go through their website, subscribe to their newsletter if that is an option, examine and connect on their social media channels, and perhaps do some research to analyze what media coverage they have generated. For the call itself, I use a set of questions I refer to as a Needs Analysis. It is especially important to listen and take notes, to capture whatever information comes to light in the interview.

If you pass this initial test and are invited to submit a proposal, its first section is where you will need to create a short Situation Analysis accurately portraying the client company's status and its reasons for seeking professional PR help. Also, remember this: Although this is an interview of you by another company's executives, it also represents your best chance to determine whether they are going to be a good fit for you before you become obligated to serve them.

Normally, the company's lead for setting up the interview will begin by presenting a quick overview, which will provide an explanation of why they are considering adding PR. Here are the questions you can expect them to have for you, along with some suggested answers from my playbook.

1. Q: How do you work, what is the process?

I would like to run through some questions together, which will give you a good sense of how my process works. How does that sound?

2. Q: What are your rates, how are we billed?

You may have seen on my website – my minimum retainer is U.S. \$3,500 per month, and that is based on an hourly rate, which is currently U.S. \$215 per hour (that translates into about an hour per weekday, on average). I use a standard letter agreement that is very client-friendly – after the first month, either party can wrap things up within 10 days by providing notice, and after the initial term, it continues on a month-to-month basis. If you choose to go in a different direction, I want you to be able to do that. This agreement is the same one I have in place with all my clients, and it has served us all very well.

3. Q: How do you feel about our chances for generating media exposure?

There is a spectrum of media outlets, with hard or breaking news outlets on one side and trade-media outlets on the other. By taking a balanced approach in engaging with trade media outlets and also

professionally pitching breaking news outlets when we have relevant stories for them, I feel we will be able to make great progress on your objectives. I will aim to do excellent work on your behalf.

4. Q: What are the next or the first steps?

Within a week after this call, I will send you a proposal, which provides a menu of the services I can offer, subject to your needs. I will also send a simple letter agreement. Once you have signed the agreement and arranged payment, we will begin with a deeper dive into your positioning, assess your communications channels, and ensure we have the most strategically sound messaging in place everywhere. I will then research and build our media database and begin organizing our communications initiatives.

Here are the questions I present to potential clients from my Needs Analysis. Rarely do I ask them all, because many of them may be answered in the client's initial comments, or I may decide to research certain answers on my own.

1. How's business?
2. What led you to consider expanding your PR efforts?
3. What does your company specialize in?
4. Who is your main competition?
5. What is most unique about your company?
6. What are your main marketing objectives?
7. What are the most important aspects of your marketing plan that I should be aware of?
8. What news-worthy projects or announcements are coming up?
9. What media outlets are of the most interest to you?
10. What else is coming up soon that is important for the company? Involvement in industry events, speaking engagements, etc.?
11. How important are awards programs, and are you interested in having me monitor those and/or coordinate submissions?
12. When does the PR campaign need to begin?

Having asked these questions and gathered notes on the answers, you are now in great position to create a proposal. What remains to be done is positioning yourself as the perfect candidate for their needs and demonstrating your expertise. The talking points I use for those purposes begin with three triangles.

- The McNeill PR Triangle: This framework was shared with me by Digital Kitchen's co-founder and CEO Don McNeill in an initial interview for

his company's PR account. According to Mr. McNeill, PR came down to three things: (1) the work; (2) a company's efforts to communicate with its PR partner; and (3) the capabilities of that PR partner.

If you introduce this framework by saying that a successful business leader has asserted that PR campaigns have those three main ingredients, be sure to emphasize that the first two components are in the hands of the client company. Therefore, the results you generate will be built on the quality of their work and the support they will provide to you.

- Lead, follow, or get out of the way: I often tell my clients that we cannot do PR on something until they have a happy client ... and sometimes, making the client happy is impossible. There are also other reasons why every company development is going to need to be assessed individually to determine whether it is a fit for being promoted. Assuming it is a go, we then need to determine if we are going to lead, follow, or get out of the way.

This filter is based on the knowledge that clients often have clients, and in that chain of command, there may be other PR professionals engaged to lead the PR strategy around a given project. When others are "leading" the efforts, the best you can hope for is to be granted permission to "follow" with your client's effort, after the leaders' plans go into effect. In the absence of another leader, that is a momentous opportunity for your client to leverage your capabilities and offer to extend your services to its client. To make this clearer, imagine your client is a toy maker, and an inventor comes to them to make a special commission. If the inventor has no PR team, your client can offer your services to lead the PR campaign, where your objectives focus on getting people to stock or purchase the toy, versus just promoting your client's brand, strengths, and stories. In this situation, it is important to remember who is paying the bill and to ensure they approve of all your efforts.

The final alternative – "get out of the way" – is what happens when your client is not able to secure permission to lead or follow. Normally, there are still opportunities there, like promoting whatever news coverage does come out on social media, adding the project to your client's website, and possibly submitting the project for awards, if those steps are permissible.

- Big, medium, and/or small: Based on whether we are leading, following or otherwise, and how the company feels about a given project, together

we will then determine the scale of our promotional effort(s). “Big” would be a press release, perhaps with the goal of attempting to place an exclusive or angling to generate wide media coverage. “Medium” might just be some limited pitching to place a story or two, and “small” would be website and social media seeding.

By now, you can hopefully see how explaining these three triangles positions you as being a person who knows how to strategically evaluate PR opportunities and then move into certain plans of action, based on situational analyses. In the initial call, you could potentially stop there, ask your clients what other questions they have for you, provide those answers, and let them know when they can expect to receive your proposal.

The importance of being extremely familiar with the contents of your proposal cannot be overstated here; you will need to be prepared to use it to answer questions, and to let your potential clients know what to expect when they receive it. If you have the time and want to demonstrate your expertise even further, you might explain these standard components of a PR program you will be aiming to develop and use on your client’s behalf.

- Objectives: Depending upon the priorities, your efforts might focus more on legal, HR, customer service, marketing, and/or sales, for a few examples.
- Boilerplate and positioning: Early efforts will emphasize the standardization of these vital aspects of their business communications.
- Executive bios will be organized and/or written, especially for the company’s leaders.
- News Releases: When project-driven, these are subject to client approvals.
- Preparing to pitch, including analyzing media targets of interest and gathering contact information.
- Assessing, advising on and/or managing social media channels, depending upon client needs.
- Exploring original or company-driven projects and initiatives which can make a company more interesting (e.g., REI’s #OptOutside policy and promotional campaigns, and the Box Tops for Education program operated by General Mills).
- Researching speaking opportunities, developing speaking topic proposals, and pitching, if those activities are of interest. If so, bear in mind that pursuing speaking engagements can be very time-intensive, and that success often requires a dedicated, sustained effort.

Having answered their questions and explained how you will approach the handling of their communications needs, hopefully you will have passed the initial test, and they will be eager to receive your proposal. Assuming you are encouraged to continue the pursuit, you now have some writing to do.

The Proposal: Gearing Up

Take comfort in this: The language you present in your proposal provides the architecture that will support everything you might do for your client, no matter how long the relationship lasts. You and I both stand on the shoulders of giants in this regard. My gratitude begins with Michael Terpin and extends to all those who contributed to the proposal language I inherited in pursuing new accounts through TTG.

Venturing out on my own and closely examining the information I felt I needed to share with my potential clients to close deals, I made a lot of tweaks to the TTG proposal template of 1999. There were some practical reasons for this, as I am sure you can understand; if you do not feel comfortable proposing to confidently provide some service for a business, that is a good reason to rewrite your proposal language to clarify your confidence level, for one example. Presenting a proposal for The Darnell Works Agency and its sole proprietor necessarily had to differ from a TTG one, with its hierarchy of available account professionals. Further, I felt that if I could simply say what needed to be said to secure an agreement, and then get to work demonstrating my value and fulfilling my clients' expectations, the proposal would have done its job. To accommodate these emphases, I removed anything I felt was non-essential. That left a few important matters from TTG's language to be addressed by other means.

For educational purposes, I want to examine vital language that appeared in the 1999 TTG proposal more closely. Well worth mentioning that document formed the basis for the U.S. \$20,000 per month account I helped win during my first week with the firm, and its core language underwrote millions of dollars' worth of agency business over the course of more than a decade. This model proposal provided a tried-and-true formulaic engagement approach, leading with an analysis highlighting the particulars of the client company's current situation. Next came an overview touting TTG's strengths, then a more in-depth walkthrough of TTG's work approaches and bios for its executives, followed by a detailed breakdown of the elements of the communications program being proposed, to include costs ... and on page 13, a parting summary. It was always used in conjunction with a letter agreement clients

needed only to sign and deliver, along with a check for the first month's retainer, to put the relationship into effect. Appendix includes an example of a 2021 DWA proposal and letter agreement used to form and structure one of my business relationships.

Regarding my need to customize my toolset for establishing my own client relationships, once again, my goals have been to reduce proposal and letter agreement language to the essentials, and whenever possible, to make the terms more client friendly. As mentioned, this has been necessary to adapt documents that were presenting a team of professionals dedicated to "leaving no publicity opportunity untouched" at a monthly rate representing half a year's worth of PR budget for a typical DWA client. The scale of effort expected for companies paying U.S. \$8,000 per month in 1999 – the lowest retainer I saw accepted at TTG during my tenure there – is going to have fundamental differences from those paying U.S. \$3,500 for a one-person communications consultancy. Naturally, the location of the PR partner represents another major factor in what many client companies are willing to pay for; having professional representation in LA, San Francisco and NYC carries a lot of weight. For all these reasons, my offerings and fees are more streamlined than the ambitious packages proposed by TTG two decades ago.

With these clarifications in mind, let's review something from TTG's 1999 proposal. Whereas that documentation referred to its hybrid client description as a unified public relations message, to me, that is my client's all-important positioning statement. Sorting that out effectively continues to be my primary focus throughout the life of a PR campaign. In my proposal, this is addressed in section three, "Key Message," which follows the Situation Analysis, and a short treatment called Approach, where I explain my qualifications for serving the client's needs. By my account, those qualifications build upon my accomplishments as "a Scripps-Howard Fellowship-winning journalist and writer," among others.

TTG's introductory proposal language quickly made the case for the "Dynamic Relationship" and "Professional Writing" – two sections I do not include, but which are important to understand and build upon. To explain, the work of a communications consultant relies on high quality information exchange to be effective. Committing to daily contact is essential for both parties in establishing a working relationship that can flourish, given the challenges that come with fulfilling expectations in the realm of PR. Is this something that needs to be expressed in a proposal, or can it simply be put into practice? Here is my answer: The word "daily" never appears in my proposal.

Professional writing is another point of emphasis I attempt to make evident through my work, versus calling it out in my proposal. Between the Situation Analysis and my Approach section, I aim to make it perfectly clear that I am qualified, and to use words that are engaging and convincing.

The Proposal Itself

Once again, from the top: We are seeking to perfect a document that will allow your potential clients to see what services you offer, where you begin by addressing it to them personally. There is a cover page with their logo and yours, then page one begins with the Situation Analysis. What is often a single paragraph in my proposals explains the particulars of the client's business at the point in time where the need for professional PR has put us in contact. A second paragraph makes the case for my expertise.

Section Two, Approach, fortifies my qualifications while also summarizing how I work in handling media relations, with a brief treatment on the need to be diligent, careful, and strategic. I mentioned how the TTG proposal framed up the discussion around the Key Message; appearing as my third section, I come at this somewhat differently. While I do adopt TTG's approach and explain how important it is, I do not include their current positioning language*. Instead, I present approximately ten boilerplates that I round up from companies on their competitive horizons. Sometimes, these boilerplates present companies from fields where the client only aspires to compete. This is an original aspect of my proposals which elegantly drives home important lessons about the power of key messages, while priming my potential client for the task of perfecting theirs.

* Here, I will interject an insight crystallized for me by Blair Enns, CEO of Win Without Pitching, and author of *The Win Without Pitching Manifesto* and *Pricing Creativity*. Speaking on the topic of business development and using the analogy of how a doctor approaches a patient (examine, diagnose, treat, re-examine), Mr. Enns asked us if we would ever attempt to diagnose a patient without first performing a thorough examination. This scenario was raised to address the all-too-familiar situation where marketers are invited to pitch for clients without an in-depth understanding of the company they are seeking to serve. As a suggested policy, Mr. Enns advised only beginning to fix client problems after one is hired. I have attempted to reflect that sage advice in my proposal presentation on the Key Message.

Section Four, Strategic Objectives, owes much to TTG's proposal language. Eight descriptive statements set out a comprehensive framework designed to deliver anything and everything the client has in mind to achieve in engaging with a dedicated PR professional. The next section on Target Media is comprised of a short paragraph in my version, in contrast to the half-page of detailed diligence in TTG's U.S. \$20,000-per-month version. In theirs, the various types of media outlets are defined, and specific examples of the media to be targeted in the campaign are listed. In a DWA proposal, Mr. Enn's directive is further served, as I summarize the full range of media outlets I have reached in the past for my clients and indicate that similar diligence will be applied to generating exposure on behalf of the new client, in support of its specific promotional objectives.

Section Five, Ongoing Monthly Services, is a half-page section using a streamlined version of TTG's model. The more ambitious approach filled more than three pages with detailed descriptions of specialized services – including the handling of large-scale media events – which certainly factored into TTG's ability to win such accounts on its terms. Although I am confident in being able to handle many aspects of event development and marketing, the fact that it is not my forte is one reason my proposals do not address the development of events. Still, by offering to provide the following services according to the client's priorities and budget, I have found success, and I feel you can, too.

- Market Positioning
- Corporate Image-Building Campaign
- News Bureau
- One-on-One Interviews
- Awards Competitions
- Speaking Engagements
- Networking and Business Development Opportunity Research and Exploration

From that point forward, a single page provides more than enough canvas to clarify the Costs (with reference to my letter agreement), confirm my Availability, and provide a brief closing Summary.

The Letter Agreement and the Engagement

In the same way that the proposal follows the initial interview and formalizes its discussion into a cumulative framework that will organize the client/

agency relationship, the letter agreement aims to render a mutually acceptable contract that is enforceable by both parties. Over the span of about three pages, this agreement confirms what has been discussed, stipulates payment terms and consequences for non-payment, while also formally addressing other important matters of the relationship.

For those interested in the contract language I inherited from TTG which does not appear in my current agreement, there are two paragraphs I have removed. In the original, the period of the agreement stands for its full initial term (often 3 months at the minimum) and can only be terminated by the client for “Cause,” defined as involving fraud or willful misconduct on the part of the agency. After that initial term, either party is at liberty to terminate the agreement with or without cause by giving the other party a minimum of 30 days’ notice. In my experience, I have gotten to the place more than once where a situation arose with a client where I knew the best solution was to wrap things up quickly. Also, rather than having the longer period forced upon us all and introducing language about cause (with its negative connotations), I chose to simplify that section. The only mention of that word in my standard agreement (see Appendix) is to state that either party may terminate it with or without cause at any time after completion of the first month, by giving no less than 10 days’ notice.

My other main revision from TTG’s 1999 model contract removes a paragraph that warns the client against hiring staff members and puts a price on such an occurrence. While that is a legitimate concern for a larger agency, a sole proprietorship obviously has no need for that provision.

At the suggestion of my lawyer, an arbitration clause has been added into my letter agreement. As the final component of a series of activities designed to educate both the client and the agency about each other’s needs and strengths, to clarify the work to be done together, and to forge a legal, binding relationship, I have found my version of the letter agreement to be essential and extremely effective. More than once, I have been asked to sign another company’s contract, instead of them signing mine. A standard clause closed TTG’s contract, stating that prior to signing the agreement, all parties were advised to seek legal counsel. Standing on that advice, I encourage you to follow this prescription and have a lawyer review any agreement you put forward or agree to, to ensure you fully understand your obligations. That way, if it becomes necessary to enforce the agreement, you will be as prepared as possible.

Thankfully, so far, I have never needed to have a lawyer involved to end an agreement on good terms. To me, returning money received on an account

where a problem has arisen is always an option, but I have only had to take that step once, early in my career. In that situation, I knew my peace of mind was worth much more than the small fee I had received.

If all goes well, you will soon receive a signed letter agreement and a check for your first month's retainer. That impressive achievement will require you to begin earning your keep.

The Kick-Off

Whenever an organization makes a choice to formally engage with an outside consultant, it is a big deal. You can guarantee that someone there, if not every top-level executive, will be waiting for you to guide them on the next steps. If you were effective in your biggest jobs up to the point of winning the account (listening and assessing their situation), you should have a good handle on the essential facets that will frame up your communications plans. However, unless you have no choice but to jump right into the fray and work on getting that first story out into the world, it is often wise to usher your clients through a more formal and in-depth planning phase.

As suggested in the initial interview, even before the client signs your agreement, you can expect to be asked, "How do we get started? What are the next or first steps?" I've already shared a guideline for you, with this answer: "We will begin with a deeper dive into your positioning, assess your communications channels and ensure we have the most strategically sound messaging in place everywhere. I'll then research and build our media database and begin organizing our communications initiatives."

However, let's pause a moment. Now that you are engaged to help lead the PR efforts for this company, it is time for your strategic leadership to begin. If you feel it is most critical to better understand your client's operations and needs before swinging into action, this is the moment for you to make your case. After all, spending time to solicit answers to important questions is sure to clarify the objectives, thereby solidifying the strategies and tactics you and others will use to pursue the desired results and improving everyone's chances for success. Even so, having assessed your client's needs and established your ability to address them, the engagement should commence, with at least some consideration of the ground situation and what your instincts warrant.

- Are you directly engaging with the leader, or is your liaison coordinating with you and then having to report through the chain of command? This answer may prompt you to skew your early approach to the challenges your liaison is currently facing, versus larger issues affecting the company.

- Is this a well-managed organization that is patiently prepared to support your mission, or is PR further down the list of priorities? This answer may prompt you to skew your approach to demonstrate your capabilities sooner, versus doing more due diligence to better plan for longer term impact.
- Is something momentous transpiring which demands immediate attention? If so, you must rivet your attention to this development, knowing also that if you cannot assemble a strategically sound platform to support it, this relationship may quickly flounder.

Assessing such corporate, logistical, or management-oriented details of your new client's operations may alter your first steps with your client, since a crisis where your help is needed is sure to fully absorb your initial attention. Based on your best sense of your client's willingness to support campaign planning, choose whatever you feel will be your best approach, and lead the way.

To commence, here are some details I have included in the cover letter included in Appendix, where I propose a standard campaign start.

- If you have not already met the clients in person, it may be a good idea to offer to meet with them in their chosen location at some point during your first two months, at your own expense (discreetly clarifying that you will want to charge for the time that you spend meeting with them). This strategic idea is discussed in more detail in this chapter's upcoming section on Billing; if you choose to put it forward, proposing a date and location for this meeting will be a strong indication of your commitment to the relationship.
- Step One: Revisit positioning and ensure it is as strong as possible for the foreseeable future.
- Step Two: Identify key business objectives to be served through the PR campaign in the early going, and perhaps second-tier ones to be addressed down the road.
- Step Three: Inventory the company's branding and its owned media channels and discuss how those can be strengthened and used in unison to address its objectives.
- Step Four: Inventory "news-worthy" developments and plan how and when to use those – with the goal of establishing a content calendar for the immediate future or longer term.
- Step Five: Additional planning to support prioritized objectives – for example, media relations, awards, speaking engagements, recruiting, business development, and social media.

Formal Communications Planning

Again, depending upon the size and complexity of your new client's organization, proceeding through a formal communications audit may be an extremely valuable approach for everyone involved, especially you. Offering the unique ability to identify and survey both internal and external stakeholders in a company, being able to collect, analyze, and decipher the findings would put you in a pivotal position early into your relationship. Here are five articles you can use to help you formulate your approach in justifying, organizing, and completing a communications audit.

- “Five steps to conducting an effective communications audit” by Alejandro Licea: <http://bit.ly/5caudit>
- “Eight key steps for a successful communications audit” by Heather MacLean: <http://bit.ly/4caudit>
- “How to Conduct A Social Media Audit” by Kristy Morrison (Bolsinger): <http://bit.ly/3caudit>
- “Responsibilities of the PR Policymaker” by Deirdre Breakenridge: <http://bit.ly/DBprPM>
- “Communication Audits” by National School Public Relations Association: <http://bit.ly/2caudit>

The results of a communications audit can take many forms. Certainly, there will need to be a report that is sure to be of wide interest to the client company's executives. I engaged with PostWorks New York in May 2004. On June 22, I traveled to NYC to present my Strategic Marketing Plan to the company's chief executives. A fond take away from that meeting was the company's CEO holding up his copy and saying that everyone should treat it as our marketing bible moving forward. That highly productive DWA relationship continued for five years, serving PostWorks through to its acquisition.

The Communications Planning Fire Drill

Contrast that PostWorks scenario with one I ran into in October 2018. Contacted by a gentleman in San Francisco and invited to discuss PR for the high-profile leader of his client company, I was given access to a completed Strategic Communications Plan about an hour before our first conversation. I am sure you can see what a different opportunity this represents, versus having a group invite me to help them methodically formulate a communications program for their company, and then working together to activate it.

In the latter scenario, even before I was hired, I was essentially being asked to ingest their entire strategic communications plan and then tell them how to spring into action to address the objective they singled out.

There are many new business opportunities for communications consultants that fall in between these two examples, but it is a relatively safe bet that most of them are going to skew toward the fire drill. Even seasoned executives will expect validation of their expenditures relatively quickly, and who can blame them? The average lifespan for a Chief Marketing Officer at any given company is about four years²: Although you probably will not know whether your client's marketing leader is just settling in or on the way out, dynamics like this may make your job much more challenging. So, whether the planning has already been done for you or it quickly becomes clear that you must leap into solving some highly specific problem, the recipe I have shared is going to serve you well.

To register as effectively as possible, go through those five steps and work on preparing yourself for action according to what you learn. Chapters to follow will guide you through Positioning, Internal and External Communications alignment, and then, the vital aspects of being a communications consultant, including media relations.

Time and Record-Keeping

At TTG, we billed clients by the hour, working within our allotted monthly retainers to deliver results that kept our clients coming back. In 1999, here are the hourly rates included in our proposal materials.

- Agency President, \$325 per hour; Chief Operating Officer, \$225 per hour; Vice President/General Manager, \$210 per hour; Group Director, \$185 per hour; Account Manager, \$165 per hour; Senior Account Executive, \$140 per hour; Account Executive, \$110 per hour; Assistant Account Executive, \$90 per hour; Account Coordinator, \$75 per hour; Intern, \$40 per hour.

Charging by the hour is not the only – nor necessarily the best – basis for establishing a working relationship with your clients ... but it is the one I have chosen, and it has served me very well. If you read Dr. Alan Weiss's book, "Getting Started in Consulting," you will encounter a full treatise extolling the virtues of flat and value-based fees, where hourly fees are allegedly unconscionable.³

Some of my colleagues in the business do operate on a flat-fee basis, and I feel there is more than one upside. Still, as an honest, hard-working professional who aims to keep life relatively simple, to find clients I enjoy working with who are committed to making PR part of their business and working with me if I can show them value, I embrace the security and peace of mind that my way of doing business affords me and my clients. The arguments Dr. Weiss makes are vehement, which makes sense, as he must defend his value-based approach and convince his readers it is the only way to go. If you follow his counsel, it seems your fees could increase exponentially, and as such, perhaps I leave some money on the table by billing hourly. Earning money at rates like those cited in TTG's 1999 proposal materials is plenty for me to aim for, and to make worthwhile for my clients.

In his book, Dr. Weiss asks if it favors us when clients must be prepared to pay for every instance of our service. My answer is yes. They know I am not a volunteer, and they also know that – like the taxi, Uber, or airplane they book to take them where they want to go – I am offering them a valuable service, where they already know the cost. Providing value at the agreed-upon rate, on the agreed-upon terms, is fair, square, and straightforward.

If you adopt this compensation model for your business, the question is, can you put a system in place to allow you to accurately track your time as part of your daily business operations? At DWA, I use time-tracking software built for this purpose, but I have found that even using a stopwatch, and sending emails to myself to track my activities, can do the job very effectively. A Google Sheets spreadsheet, or even a piece of paper, can be used to compile your time charges day by day. If you use QuickBooks for your business book-keeping (highly recommended), you can use that to track your time. Also, there are apps like these which I have used that do an excellent job.

- Time Card for Android Free: <http://bit.ly/tcaFREE>
- Time Card for Android: <http://bit.ly/tcANDrd>

What I find equally important to the daily time entries are the descriptions that explain the day's activities for my clients' oversight. At the end of a given period, when I deliver the month's Activity Report and an invoice for the period to come, that is a momentous reckoning. It is perfectly reasonable to expect that the client's executives will review this receipt, that the activities it illuminates (based on your descriptions) will be judged alongside any other feats you have helped to accomplish, and if all adds up, your relationship will continue. Otherwise, presenting that report may be one of your final steps on behalf of that client.

Be sure to review the sample Activity Report I am including in Appendix to see how I carefully construct them, how I report the day-to-day activities, and how I total them. My aim is to over-deliver by 10% in terms of hourly billings compared with their retainer, and to add so much value that PR expenditures are perceived as slam-dunk investments.

Billing

Your website is one place you can explain your costs and terms of doing business to potential customers. Based on the hourly rate you feel you can justify, and the number of hours you feel will be necessary to demonstrate your value to your clients and address their needs from one month to the next (or, to complete their project, if you decide to bill on a project basis), communicating this fee to the world is well advised.

From there, the fact that you will bill for this fee is addressed in the letter agreement (again, if you are proceeding on a project basis and your client agrees to pay your fee, neither party may feel that a letter agreement is necessary), and upon receiving a signed letter agreement, your client will be expecting you to present an invoice.

At TTG, I learned that it is industry standard for PR professionals to be paid in advance, and payment for the first invoice I issue to a client is always either “due upon receipt” or within 15 days if I am feeling confident and generous. For ongoing accounts, per my letter agreement, I also provide an invoice 30 days in advance of the next period and let them know I hope to receive payment against it as close as possible to the next period’s start date.

Your proposal also addresses expenses which you will be entitled to recover in certain circumstances. This language comes straight from the 1999 TTG proposal template: “Typical expenses include postage, photocopying, fulfillment, telephone, mileage, parking, delivery services, clipping services and press release distribution services. Out-of-town travel expenses include airfare, hotel, transportation, parking, and meals.” TTG’s 1999 contract addressed these matters further, obliging clients to pay a standard agency mark-up fee of 17.65% of the total expenses incurred on the client’s behalf.

Note here that my proposal language adds a couple of lines: “If approved monthly expenses total less than U.S. \$75, they will not be charged. There is no mark-up on expenses.” Why? For a client company agreeing to pay my monthly retainer, I have seen that the time spent getting expenses approved, and then breaking them out and billing them, is something of a drag. Not

charging a mark-up is a means of showing integrity and promoting trust. Also, having some expenses to present for tax purposes is beneficial for my agency.

Remember my suggestion to visit your client relatively soon after your partnership begins? Covering the cost for your own travel and your own hotel is gracious, it represents a valuable investment into the new relationship, and this practice has served me well. However, in all honesty, this “in-person visit” is not exactly standard for me, as my clients generally understand that for me to be effective at my job, I need to be in my own office. Also, if the time/expenses for this trip are formidable, I have often found it better to skip this offer and focus instead on getting to work (after all, there is always Zoom). If you adopt the suggestion to visit a client at your expense, again, make sure they understand that you are still intending to bill for your time during your meetings.

Regarding expenses, I will add the recommendation that instead of you incurring a cost and then having to file for reimbursement, it is better if you can arrange for your client to cover that cost directly. Whenever you can present the actual bill directly to your client for payment, or gain permission to have payment applied to your client’s credit card, that will save you time and expense.

Finally, if a client decides to wrap up your account, you may find yourself needing to refund some unused portion of a monthly retainer and needing to cancel some invoice you have issued in advance. It is my experience that having these billing policies and procedures in place is a vast improvement over the one where you are awaiting payment. Any client that does not come through with payments when they are due is subject to violation of your letter agreement if you follow my lead. Hopefully, your clients will line up their payments with your requests, and this professional handling of these small but important matters will result in a regular stream of income, one client after another, and represent the life’s blood of your communications consultancy.

Exploration

1. What are the main benefits of having your minimum terms of engagement expressed on your website?
2. Determine your hourly rate and the other terms of your minimum client engagement. How do you justify that hourly rate and minimum monthly retainer?
3. Prior to engaging with a potential client in an initial interview, line up at least two friends, colleagues, or family members to do a mock interview

with you, where they ask you the four standard questions. Answering those smoothly and confidently is a requirement for landing your first client.

4. In your mock interview, find your own way to introduce and talk-through (a) the McNeill PR Triangle, (b) lead, follow or get out of the way, and (c) the big, medium, or small framework.
5. Assuming a client invites you to provide a proposal and they sign your letter agreement, explain how you present them with a plan to get to work.
6. Describe the means you plan to use to ensure you are working on the right activities in the right ways to maximize your value for your client.
7. You may never be able to convince a client of the value of a communications audit if you have never completed one. So, pick a business entity, non-profit or institution where you have an in, and offer to do this work on a pro-bono basis (unless you can arrange a fee, in-kind barter arrangement or some other receipt). Track your time as you go, to learn how long it takes to complete such an undertaking. Upon completion, explain why you feel better prepared to impact the organization than if you had just been asked to support a smaller initiative where you were given standard communications guidelines.
8. For your own consultancy, use the five steps identified in the sample Cover Letter in Appendix to formulate a promotional campaign you can put into effect to set yourself apart, and execute that plan (tracking your time as you go, to learn how long all of this takes). Consider completing a more formal communications audit on your own behalf.
9. A potential new client wants to pay you many months' worth of retainer in advance, for tax purposes. Assess the pros and cons of this scenario and share your thoughts on how you would handle it.
10. Familiarize yourself with the idea of value-based compensation and formulate your rationale for being either hourly, flat-fee or value-based in how you handle business relationships. What is your rationale for your means of compensation?

Notes

- 1 Darnell, R. (2007, May 12). Leadership Brand-Building in One Easy Step. Universal Positive. <https://up.darnellworks.com/?p=77>
- 2 Kornferry. (2017, February 13). Age and Tenure in the C-Suite. Kornferry.com. <http://bit.ly/C-Sage>
- 3 Weiss, A. (2009). *Getting Started in Consulting* (3rd ed.). Wiley.

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