**5 BOROUGH**
**COMMUNICATIONS**

# The 5 Dimensions of Communications

# CONTENTS



*Planning for tomorrow needs to begin today, tomorrow is too late.*

# oo Introduction

When people think about an organization's communications, they usually either think "PR" or "internal communications."

And yes, they are two essential elements of a full-scale comms shop, but there is a lot more to creating and managing an agile and successful department.

Communications impacts all aspects of a business. A good comms shop is a value add to your organization. They help put out fires, navigate complicated issues, generate ROI, and serve as a trusted advisor. If your comms shop is not fulfilling the above, there is room for improvement.

The **5 Dimensions of Communications** is my way of organizing and managing the different dimensions (or boroughs, he says tongue in cheek) as good comms is only as effective as the infrastructure behind it.

Continue reading below to see what makes up the **5 Dimensions of Communications.**

# 01 Team & Development

Your team is at the heart of any effective internal or external comms planning and execution. If you're a founder just starting and beginning to grow your team; or the team leader yourself, an agile and well-managed team will be your primary asset and should be supported and developed.

**Team & Individual Traits**
**Six Key Traits to a Great Employee Experience**
**Building a Team**
**Team Audit**
**Comms Office Rebranding**

## What are the traits that make a well-managed and agile team?

Famed Harvard organizational psychology professor J. Richard Hackman, who spent 40 years studying teams, identified the three main conditions of effective teams: **direction**, **structure**, and **support**.

- **Clear direction** is the main component of a great team. Teams work towards a common goal and grasp how their work impacts an organization's mission.
- **A strong structure** ensures that the team balances diversity in knowledge and views while promoting positive dynamics.
- **Support** includes reward, information, and development. Team members are aware of their roles, know how to obtain the information necessary to complete tasks, and are continuously encouraged and developed.

## What are the traits that I should look for in my teammates?

There are three essential skillsets/traits that I look for in my teammates - **communication skills**, **agility,** and **composure**. As long as someone has the capabilities for these three skills, a team leader can guide them to be an effective and skilled comms professional. In fact, by design, most of the teams who have worked for me didn't have any direct comms background and were in other fields when recruited.

Having a good grasp of your team's capabilities will allow you to grow and encourage these skills.

- **Strong communication skills** are at the heart of an effective comms professional. Being able to listen, comprehend, speak and write is necessary.
- **Agility** is an essential skill for any comms professional. The nature of the work requires this skill, and those who cannot be flexible will soon burn out and become dissatisfied. This is especially true when a team is just starting. Everyone needs to have a common goal and be willing to take on new responsibilities depending on the day or project.
- **Composure**. Ideally, we want all of our teammates to be resilient. However, comms professionals are under a great deal of stress and pulled in many different directions. Resiliency, or grace under pressure, is ideal, but not everyone has this trait. (That being said, the team leader must be a resilient professional and calm under fire.) For everyone else, I will accept at least the appearance of composure. Comms professionals can, at times, be front-line workers and need to be composed and professional.

## So, what about from the teammate POV?

**Six Key Traits to a Great Employee Experience**

Comms shops are fast-paced and, at times, stressful environments. Your role as a leader is to cultivate your talent and build a great culture to create engaged teammates. Below are six traits of a high-functioning shop from a teammate's point of view.

Glint has a great article on People Success, and I've been following these tenets for many years in all of my shops.

- **Well-being**. Feeling safe and valued and treated with respect.
- **Connection.** Mutually respected relationships; a sense of belonging.
- **Focus.** You know what success looks like and what to prioritize.
- **Empowerment.** Ability to make decisions and direct own effort.
- **Growth.** Your development is encouraged and shepherded.
- **Purpose.** You know how your value and contribution adds to the whole.

---

## Building a Team

There is no one way to build a communications office. Your needs will be based on the type of organization and size & scope. However, a few of the more common roles are described below.

**Team Leader** (Director of Comms, Press Secretary, V/P of Public Relations, etc.). Your chief spokesperson and comms director. May manage people under them and works closely with HR on internal comms matters. Typically reports to CEO or CMO.

***A quick word on One-Person teams***. A one-person team must identify colleagues who touch on communications (web manager, customer service rep, donor liaison, etc.) and create a regular dialogue. Schedule a reoccurring meeting where all parties meet to discuss ongoing comms and issues.

**Internal Experts.** No matter if you are a one-person team or manage a large group, identify your internal subject-matter experts. These are the people who can help brief you and speak with the media and the public as needed.

**Press Officers** (Engagement Managers, Public Information Officers, etc.). The worker bee of any comms team.

***A quick word on specializations***. Your press officers/engagement managers will most likely have functional specialties and expertise. For example, one may be responsible for social media; another may be responsible for event planning. Depending on your organization, someone may be more skilled in one aspect of the organization over another. No matter how you set up your roles, ensure that everyone is backed up by another to provide PTO and emergency coverage.

As the team leader, you should have a basic understanding of all of the functions. Throughout my career, I have never assigned a function (social media, content development, etc.) until I had enough of an understanding and could serve as the ultimate backup.

**Specialized Staff.** Again, depending on size or scope, you may find yourself in need of, or in charge of, additional functional teammates.

- Social Media Manager
- Speech Writer
- Internal Communications Officer
- Designers
- Photographers
- Web Developers

---

## Team Audit

If you've recently inherited your team or been running your team for a few years, conducting a skills audit can be an excellent way to determine new roles, update job descriptions, and identify future training.

Before starting an audit, first, start with the basics - the job description. Then, review it with your teammate to determine the accuracy and make updates.

The Society of HR Managers (SHRM) has excellent resources for conducting various audits.

1. Determine the scope and type of audit.
2. Develop the audit questionnaire.
3. Collect the data.
4. Benchmark the findings.
5. Provide feedback about the results.
6. Create action plans.
7. Foster a climate of continuous improvement.

***Note***. Three helpful questions if you just inherited a team.

1. What is one thing you'd like to stop doing?
2. One thing you'd like to start doing?
3. What should the new team leader focus on over the first three months?

---

## Communications Office Rebranding

Building or recently inherited your team? Trying to create a sense of unity or rebrand the office? First, consider a new office name - Office of Communications to Office of Public Relations or vice-versa.

Second, consider adopting a mission statement.

> *"The communication office is the primary channel for telling the NAME OF ORGANIZATION story. Our mission is to maintain positive and open relationships with all of our stakeholders, both internal and external, through a variety of mediums."*

A welcome message can be sent to all colleagues outlining the rebranding and hiring of a new team leader along with your mission. Don't forget to include contact information & cell phones so that they know whom to reach.

# 02 Systems & Tools

The systems and tools used to manage a comms shop's function are almost as important as developing a well-rounded team. Some of these tools may seem self-evident and may already be found in the organization, but they become invaluable tools for effective communication.

**Shared Tools**
**Project Management Tools**
**PR Distribution & Analysis**
**Social Media Management**
**Content Management Systems**
**Email Marketing**

## Let's start with the essential tools found in MS Office and Google.

**Shared Drive**. Having a shared drive is critical to all organizational departments. The shared drive is even more mission-critical for the comms shop. All team members should have access on both their work and home computers. All the major systems (from Dropbox to One Drive) also offer mobile access.

The organization and maintenance of the Shared Drive are crucial. Documents, videos, content - collateral is only useful if it is up to date and readily accessible. If you don't know what you have or where it is located, somebody might as well delete it because it is no longer a resource.

Over the years, the folder hierarchy that I've developed for my shops includes ten main folders:

- Briefings
- Collateral
- Leadership
- Letters to the Editor
- Media Advisories & Releases
- Newsletters
- Office Operations
- Press Clips
- Special Projects
- Speeches

Obviously, your needs will vary, but I've found that having a system of approximately ten folders (with multiple subfolders) serves comms shops both large and small.

***Note.*** The Office Operations folder serves as the internal repository for administrative information (budget, personnel, etc.)

***Note 2***. January is a great time to schedule a review of the folders. If you are not sure if something is valuable, create an Archive subfolder and store items there. Incorrectly archived items are placed back into one of the main folders as needed. Delete the remainder during the following January review.

**Shared Calendar**. Create a shared calendar named "Comms Department" or something similar. All internal and external events get programmed through the calendar and then assigned to appropriate teammates. Use this central calendar to schedule all vacation and time off. Create a color code system to organize events from releases from meetings, etc.

**Shared Email Box**. Create a comms@xxx.com account that your team has access to. This mailbox will be the primary way for your different audiences to reach your organization. Ensure that everyone has this set up on their computer and assign responsibility for responses. Use the "Out of Office" to create an auto-response that thanks the individual for reaching out and sets a standard response time. You can also use this to link to any FAQ or other resource if you find that individuals are typically looking for answers to a set of standard questions.

**Cell Phones, Messaging Systems, etc**. These are all standard tools and don't need a ton of explanation. Ensure that everyone has all the contacts and create a telephone tree in case of emergency. (Also, make sure that you have everyone's emergency contact information.)

*One additional thought.* How are your main phone numbers being answered? Are there personnel to handle this, or are you using a service? For example, one comms shop I ran had a 1-800 number answered in three different locations; another shop had a live messaging service that answered after five rings and then would text the on-call press officer. No matter how your phones are answered, create a protocol to email the inquiry to all press officers. Then, the team leader can either assign or press officers can reply to all they are taking the lead on an issue.

---

## Project Management Tools

You are probably familiar with Asana or Monday(.com). These project management tools are excellent for any comms shop to manage:

- Annual plans
- Editorial calendars
- Special projects
- Individual assignments to team members
- Record keeping (Asana has a private area that is perfect for keeping quick notes on any subject that you'd rather not have on the shared drive.)

Asana allows you to make as intricate a plan as you need and assign tasks to multiple people with deadlines.

***Note***. Of course, Microsoft has its own project management tool, but, as of this writing, I don't find it as user-friendly or advanced as Asana or Monday. This may very well change in the future.

---

## PR Distribution & Analysis

There are so many of these products on the market, and they all have similar services (press release distribution and media contacts). Your shop may already use one of the big hitters like Cision. If you inherited your shop, you might have a subscription, along with a contract. If you are just starting, take a look at MuckRack, which many comms professionals recommend.

There are also some secondary, specialized monitoring services like Awario, which looks at brand sentiment, or Buzzsumo, which focuses on influencers. Finally, look at my list of **Online Resources** below for more services covering everything from distribution & analysis to AI content generation & royalty-free photos.

---

## Social Media Management

Like the above, you may already be using one of the leading platforms like Hootsuite. Social media platforms allow you to house all your different social media accounts under one umbrella. You will have the ability to share content across other platforms (along with scheduling the date/time of release) while also analyzing past campaigns.

SocialPilot is another alternative to Hootsuite with similar capabilities. (It should be noted that there is also a Twitter-specific platform, TweetDeck, which began as a standalone app but was integrated into Twitter).

All these accounts (apart from TweetDeck) will cost you, but they all provide a free trial to play around with so that you can decide which one is best suited for your shop.

---

## Content Management System

Essentially these are used to build and manage a website without needing any coding skills. The market is full of these platforms, and everyone has their favorite. WordPress is one of the popular ones, along with Weebly (with which I built 5 Borough Communications). They all have different price points but will all provide web and app interfaces. Some will be more content-focused, while others are more e-commerce focused.

---

## Email Marketing

There are hundreds of players in this field and too many to review in this space. Essentially, you will need to determine what services you require and then begin drilling down on the options in the market.

For example, ConstantContact and Mailchimp are very popular and easy to use, while WildApricot is a lesser-known platform designed for member societies.

And the line between CMS and Email Marketing platforms can get blurry. For example, the three services above also do website management.

# 03 Internal Policies & Procedures

Internal Processes goes hand in hand with Systems & Tools but is less about the SaaS used in a comms shop and more about the policies governing communications within an organization and workflow management.

**Media Response Policy**
**Social Media Policy**
**Comms Office FAQ**
**Key Staff Engagement**
**Internal Procedures – Fielding Inquiries**
**Internal Handbook**
**KPIs & OKRs**
**Kanban**

Internal Processes goes hand in hand with Systems & Tools but is less about the SaaS used in a comms shop and more about the policies governing communications within an organization along with workflow management.

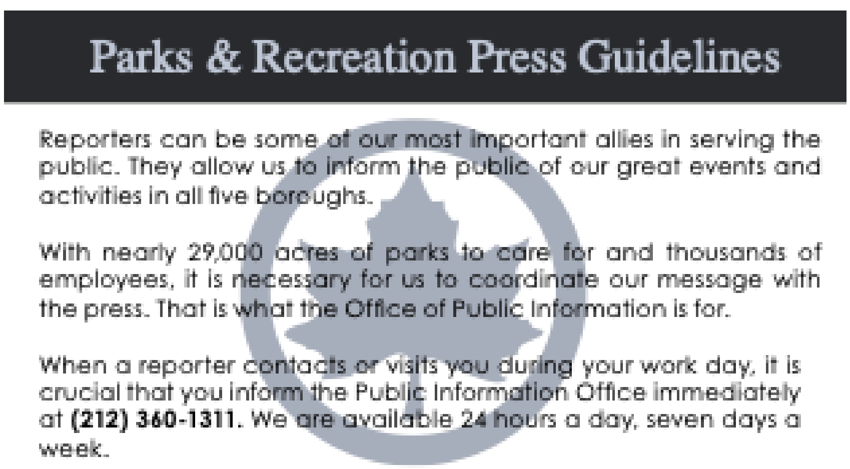
Starting with policy, we first want to look at what communication protocols the organization has implemented. For example, is there a defined policy made available to all employees to mitigate risk? Is it updated regularly and included in new employee orientation? If not, let's explore some of the basics for designing both a Media Response Policy & Social Media Policy.

## Media Response Policy

This policy should clearly state that only authorized individuals are permitted to speak on behalf of an organization and detail exactly what to do if approached by a member of the media. Rather than be a dry set of rules, it should also clearly outline the reasoning behind such a rule.

For example, explain that the Communications Office is trained to deal with the media and access information that allows your organization to ensure that media responses are up-to-date and help drive the organizational narrative.

*Tip*: At the NYC Parks Department, we had thousands of front-line workers regularly approached by the media. We created a wallet card that not only included our office # but also included some helpful messages.



Parks & Recreation Press Guidelines

Reporters can be some of our most important allies in serving the public. They allow us to inform the public of our great events and activities in all five boroughs.

With nearly 29,000 acres of parks to care for and thousands of employees, it is necessary for us to coordinate our message with the press. That is what the Office of Public Information is for.

When a reporter contacts or visits you during your work day, it is crucial that you inform the Public Information Office immediately at **(212) 360-1311**. We are available 24 hours a day, seven days a week.

## Social Media Policy


These types of policies help protect your organization and encourage your employees to take advantage of social media in a safe manner. There are many policy examples out there, but all should:

1. Be clear,
2. Require that you disclose your employment status when posting about your organization,
3. Prohibit disclosure of sensitive or confidential information, and
4. Represent the organization's values.

There is an excellent article on this topic by Daniel Ku that includes information on what some of the biggest companies have in their social media policy.

---

## Communications Office FAQ

Within your organization, do all the employees know whom to contact if the media reaches them? Sure, the above Media Response Policy should include this, but it should also be easily accessible on your Intranet. There may be several people responsible for media responses or one general office to contact. Ensure that each of your employees knows how to contact your comms shop during the day and evening hours.

---

Above are some of the essential policies that should be in place, but what about within the comms shop itself? What procedures do you have to ensure efficient outcomes? Again, this will depend on the size, scope, and makeup of the office, but here are a few areas that I like to focus on:

## Key Staff Engagement

Less about managing up or who someone reports to, key staff engagement is about determining who the subject matter experts are in the organization. Not only is it essential to keep an internal list of experts, but you also need to balance that against a few other factors: are they responsive to you or the team's requests? Familiar with media and good on camera?

Depending on your organization, it is easy to begin a list starting with department heads. But, first, pay attention to their capabilities (beginning with the fundamental question: do they respond to you promptly.)

Your subject matter expert may not be the head of the department, but you should understand the small-p "politics" of the situation. Some heads simply do not have the time or interest in being that expert but have no problem having their deputy stand in their place. But others will always want to be involved, even if they are not suited to the role. Remember, responding to the media can turn otherwise ordinary people into....well, several things.

---

## Internal Procedures – Fielding Inquiries

How does your shop field and track inquiries? How do you report the inquiry appropriately within your structure, and how are you tracking the outcome?

**Step 1. An inquiry comes in...**
What procedures are in place for your comms shop to respond to external inquiries/issues? How are these inputs monitored, recorded, and responded to?

Is there a central telephone number? Who answers it during the day, and what messages/practices are in place off-hours?

How well is your social media monitored for responses? Email? Website inquiries?

**Step 2. What do you do with the inquiry?**
I'm a firm believer that the entire shop (or at least the external focused members) always be familiar with the inquiries coming in. So, a telephone inquiry gets emailed to all relevant members. This trigger will let everyone know the type of inquiries coming in (the volume of which may increase if there is a hot issue or crisis) and allow an assigned press officer to field it or allow the team leader to step in as needed.

An email to the team also helps set a record and lets everyone know what inquiries are outstanding. There also may be an internal database to record the inquiry.

**Step 3. How are you generating a response to the inquiry?**
Based on the inquiry, the founder or boss may need to be alerted. In addition, you may need to seek out your subject matter experts to help generate the response.

**Step 4. Responding**
Ok, you've created your response; you've informed all internal people who need to know, now you need to figure out how to respond. Will it be a simple statement from you? Your principal? Or, if it is broadcast, does the situation merit an on-camera interview? This will depend on the case.

**Step 5. Record**
As mentioned above, tracking the response and result is always important. A simple database or shared folder can save responses for the future.

**Internal Role Assignments**. As a bonus to this section, let's also discuss internal role assignments, which is a good segue into KPIs.

As your shop begins to scale, you will need to define roles for your externally focused members. For example, you may have a social media manager, a speechwriter, or five skilled and savvy people with no assigned roles.

Does the nature of your organization require specialists or generalists? Or a mix of both? Has everyone been backed up appropriately?

Perhaps you have team member #1 assigned a main geographic area or subject matter, and team member #2 serves as their backup.

These should be questions you start to answer in your head as you begin to scale.

---

## Internal Handbook

If you are just beginning to build your shop, or have recently inherited one, consider creating an internal handbook for your team. A handbook will be a one-stop for internal information ranging from the history of the office to protocols to the voice mail code. At my first shop 20 years ago, I started a manual to help me consolidate information, and at every shop since then, I bring a copy and adapt it to the new organization.

At my last shop, the handbook took the form of a Wiki document available via the Shared Drive, but while the format may have changed, the purpose never has.

Here is a basic Table of Contents to help you get started.

1. Organization Overview
2. Office History/Overview
3. Media Protocol
4. Team Breakdown

5. Key Staff Breakdown
6. Office Basics
   - Important Contacts
   - Office Setup & Supplies (for new team members)
   - Computer & Email
   - Email Distribution Lists
   - Master Shared Drive File List
   - Passwords
   - Telephony
   - Business Cards
   - Health Insurance & Benefit Management
   - Online Resources
7. Media Inquiries
   - Information Gathering & Tracking
8. Social Media Guide
9. Events
10. Website Style & Maintenance
11. Budget & Vendor Information
12. Office Closure & Holidays
13. Business Continuity & Emergency Contacts
14. Organization/Office Policies
    - Conflict of Interest
    - Document Destruction & Archival
    - Whistleblower Policy

---

## Key Performance Indicators (KPIs) & Objective & Key Results (OKRs)

Stifle your groans. KPIs are important and can be, dare I say, fun. We are going to focus on Comms KPIs & Team Member OKRs.

**Comms KPIs**. The most important thing we want to be doing, depending on which KPIs are fit for your shop, is to measure everything. What you cannot measure, you can never improve.

- **Active Coverage**. What media hits are you obtaining?
- **Potential Reach, Social Engagement, & Share of Voice**. So, you got a hit; what's the coverage of the publication or broadcast? So, you got a retweet; how many shares and comments did you get? And what is all of this compared to your competitors?
- **Sentiment**. Looking at the above, what was positive versus negative?
- **Media Outreach**. When you hit send on a release, tweet, or post, how are they performing? And what's the quality of coverage? Page 1? A blurb on page 22?

- **Earned Traffic & Search Engine Ranking.** How many visitors are you receiving as a result of your earned coverage, backlinks, and placement? How many visitors are you receiving via search engine ranking and paid advertising?
- **Event Promotion**. Hosted an event, and no one came? Hosted an event and had standing room only? Again, this is important to track so that you can correct or improve.

**Team Member OKRs**. You want to ensure your team is going in the right direction and has clear priorities set for them. Creating alignment is one of the main benefits of OKRs.

At its most fundamental, you want to create a goal in the format of "*I will (Objective) as measured by (Key Result).*" So, we have the objective followed by a measurement (remember, you can't improve what you don't measure.)

OKRs should change often and be encouraged with regular check-ins and feedback. Team members should only have a few, but as we update them regularly, that's ok. They are usually in sync with each other or align with the shop's mission.

**SMART Goals are specific, measurable, attainable, realistic, and time-bound.**

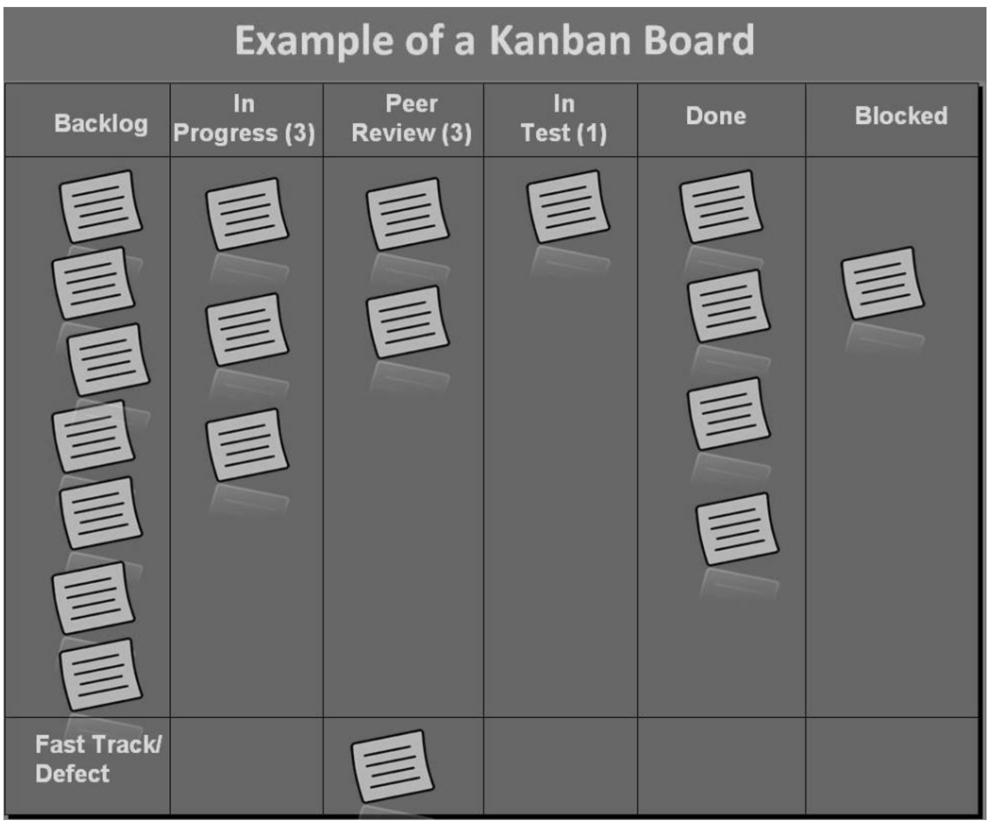
***Bonus Section*: Behaviors**
Many organizations tout the "values" that they espouse. Still, unfortunately, this is typically a PR activity that doesn't necessarily account for any change, and many employees may be hard-pressed to recite them. Sure, we should all be ethical, but how does that translate? Behavior comes from the top and is mirrored by the rest.

While having organizational behaviors that all employees can aspire to and work towards is fantastic, you may only control your small (but vital) portion of the building, so why not create a few behaviors/actions that your team can adopt. Here are a few examples of what I've used in the past.

1. **Always respond**. It sounds simple, but this is important for any comms shop. Create different time frames for the different types of inquiries that come into your shop. And if you can't commit to the original time frame, always take the time to inform your constituent and set a new deadline.
   Regarding members of the media, be upfront on whether you can make their deadline. Even if the official statement is "*no comment*" (*which you should never, ever use*), reach out to the reporter even if your response is "*sorry, we have no response*." They may not always be happy but will respect that you are at least responding to their inquiry.
2. **Know the expectation**. Make sure that assignments are clear for both parties, as a leader and as the recipient.
3. **Do what you say**. Don't make a commitment that you can't complete.
4. **Listen clearly and speak straight**.
5. **Treat everyone like a customer you want to keep**.

**Kanban**
Kanban is a popular workflow management method. An excellent process for agile comms teams that can help you plan work and identify bottlenecks in delivery. The two primary practices of Kanban are to visualize your work and limit the work in progress until you've completed past assignments.

An excellent primer on Kanban can be found here, and of course, there is an online platform with a free trial here. (However, if you have adopted Asana or a similar program, you can use those also.)




*From Wikipedia

# 04 Internal Communications

Internal communications are the cornerstone of your organization. Therefore, you need to have the right mix of tools and processes to connect and engage your employees.

**Internal Comms Audit & Tools**
**Crisis Communications**
**Employee Communications**

Internal communications are critical to business success, and improving employee satisfaction is a top driver. Employee engagement and satisfaction impacts not only productivity but also attrition levels. As per Gallup, only 3 in 10 employees feel that their opinions are valued. Upping this to 6 can lead to a 27% decrease in attrition and a 12% increase in productivity.

## Internal Comms Audit & Tools

So how do we evaluate the effectiveness of our comms? Three main ways to assess the success of our campaigns are to look at employee feedback, engagement, and open email rates.

A more thorough audit will help determine whether employees digest the information and take appropriate action while identifying the most effective tactics and ways to improve weak ones.

As with all things, there are countless resources to help you conduct an audit. Ragan, an excellent resource for all things comms, has some great tips here. But, for our purposes, let's start small and look at some basic ways to evaluate current practices and identify some standard tools that all organizations should have in place.

**Step 1: Responsibility**
The first thing to identify is where internal comms sit in your organization. It may live in Human Resources, Communications, or the Office of the CEO. I recommend that there be one clearinghouse such as Communications where experts can check all comms for consistency and message. However, Communications may not handle all aspects and could most likely benefit from a collaborative group pulling a representative from the divisions listed above.

**Step 2: Tools**
Some of the more common tools used by organizations include:

- **Intranet**. It might just be an internal repository of information or a mini-social media feed. Either way, it should be mobile and cleansed regularly for ease of use.
- **Employee Newsletter**. Use this tool to highlight company information, success, and the latest news. Remember to use visuals to make it engaging.
- **Surveys**. You should always use a light touch with surveys as you don't want to overwhelm employees. Instead, consider surveying a distinct group of employees or an annual satisfaction survey (several companies specialize in this.)
- **Channels**. Is your organization using Slack or a similar program? Besides instant messaging, channels can be supported on different internal topics.
- **Founder/CEO Townhall or Video Blog**. Sure, you have your newsletter, but I recommend making your CEO regularly available to answer the organization's questions or make major announcements themselves. As with all things, consider the saturation level, which will directly impact attention levels.

**Step 3: Discovery**
Now that we know where comms are generated and how they are distributed, let's evaluate the success and whether the right messages are getting through. A few ways to generate analysis include one-on-one meetings, group meetings with a diverse array of staff, or surveys.

Create a spreadsheet that lists the different tools used and begin to parse the data from your discovery. Consider a SWOT analysis and bring the data and discussion to your internal comms group.

**Step 4. Improvement**
Now that we have our data and analysis, we can now plan to start with the low-hanging fruit. If you don't already have an internal comms group, put one together and schedule regular meetings or touchpoints. Not using one of the tools above? Then, plan to integrate it into your organization and review success. Finally, after all of this is done, review quarterly with your group.

---

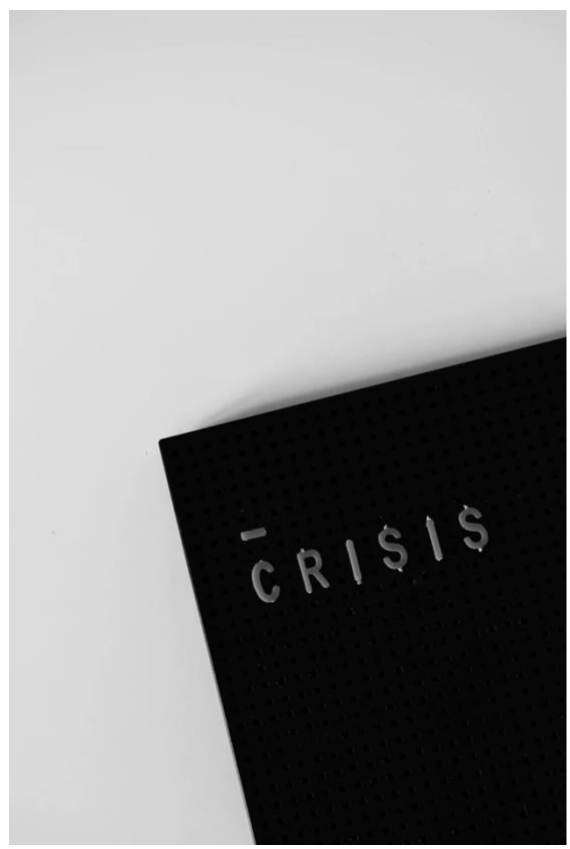
## Crisis Communications

Crisis communications is a specialized field, but you can still prepare for the worst today even if you have no direct experience.

If you are just starting with a new organization, you will begin by identifying past and current risks. For example, what type of crisis has impacted the organization in the past? Next, find out what keeps your boss up at night. Remember, plan for tomorrow's crisis today.

When creating a crisis comms plan, start simple and follow these steps:

1. First, build a crisis response team. Depending on your organization, you may need your principal, facilities manager, legal counsel, HR, and of course, yourself.
2. Begin brainstorming the types of crises your organization has experienced in the past and what might be in the future.
3. Build a phone tree.
4. Conduct a drill.



When dealing with a crisis, follow the CDC guidelines:

1. **Be first.** Many times, initial sources of information become the preferred source.
2. **Be right.** Accuracy establishes credibility.
3. **Be credible.** Honesty and truth should not be compromised.
4. **Express empathy.** Addressing what people are feeling and the challenges they face builds trust and rapport.
5. **Promote action.** Giving people meaningful things to do calms anxiety, helps restore order, and promotes a restored sense of control.
6. **Show Respect.**

**Message Maps.** Message maps allow you to create three key points to respond to a crisis with underlying facts and messages. Studies have shown that under stress, your audience will retain three key points. The Center for Risk Communication has a free tool that you can download to help you plan your three key points.

**Lessons Learned.** Once you've successfully navigated your crisis, the work doesn't stop. Reconvene your crisis response team to go over lessons learned. Discuss what went right and what could have gone better, and incorporate these lessons into your future planning and current procedures.

Doc Kokol wrote an excellent primer, "*Crisis Communications: Don't Let Your Hair Catch on Fire*," and he has six rules for dealing with a crisis.

1. Tell the truth
2. Tell it all at once
3. Tell people how to protect themselves, their family, and their pets.
4. Tell them what you know that keeps you from being afraid, and
5. Tell them when you will be back with more information.
6. Rinse and repeat as often as needed.

---

## Employee Communications

You might think we covered employee communications above in the Internal Comms section, but this is less about formal engagement and more about keeping your ear to the ground. Someone can often avert crisis (small-c and Big-C) by simply knowing what is discussed at the water cooler.

We've talked prior about having a list of subject matter experts in the organization to identify potential spokespeople and information resources. Still, as the Comms leader, you should know a few people in each division and not just the Heads. Many times, when a crisis appears, your leadership may not have been aware of the potential, but often line staff was.

Make sure you are walking around the halls at least once a week chatting with new people. Comms can be stressful, and we can all use a break. So instead, use this as an opportunity to get to know your community and what issues and successes they see in their area of the organization.

# 05 External Communications

This dimension covers the more well-known area of communications, including external engagement, media relations, social media, brand…

You get the idea.

**Preparation**
**Launch**
**Next Steps**

Before we begin any type of external outreach, it is critical to have an objective in mind. And that objective should be more nuanced than simply "generate positive press."

The following sections have been organized into **Preparation**, **Launch**, and **Outcome & Next Steps** with that in mind. If you are a founder in the early days, you may also find the 10 Tips for Startups helpful before diving into this section.

## Preparation

Preparation is key to any external campaign. Review the following section and create a checklist of what is already developed in your shop and what needs to be created/updated.

In this section, we will cover:

- Press Kits
- Press Release Templates
- Websites
- Social Media Accounts
- Story Ideas
- Editorial Calendar
- Reporter & Influencer Identification
- Media Training & Interview Prep

**Press Kits**. Press kits come in all shapes and sizes and have many uses. Ideally, the following collateral already lives on your website. Once you've determined what exists or needs to be created, set up a reoccurring quarterly calendar item to review and update as necessary.

1. Company Story/Narrative
    a. Why does your organization exist? What sets it apart from others? What solutions do you provide/problems do you solve?
2. Key Facts
3. Key Staff (along with high-res headshots & short bios)
4. Product (or service) List
5. Client Testimonials
6. Noteworthy Press Coverage
7. High-res Logo
8. Contact Information

**Press Release Templates.** News has changed dramatically over the past decade. With the proliferation of distribution services, many organizations' central PR strategy is to write a release, "*hit send*," and sit back and wait for the media attention to roll in. Unfortunately, unless you are a major company with a major news story, this rarely occurs. Add to that the fact that many practitioners aim for quantity over quality, the press release's reputation has diminished over the year.

I believe that there is still value in the press release and should be central to your storytelling. The release gives you a starting point for your campaign while allowing you to craft your story and get your facts aligned. Through the development of the release, you will be quoting your principals and perhaps stakeholders and adding your organizational boilerplate (which can be adopted by the Company Story and Key Facts from the Press Kit).

By the end of the process, you should have a one- or two-page release that has been approved by the powers that be. This becomes your approved main story and gives you a resource to craft personalized pitches for key media.

The release also provides additional content for your website, future social media posts and serves as a future resource for upcoming campaigns. Creating a template is simple - add your logo, contact information, boilerplate, and voila, you are off to a great start.

5 BOROUGH
COMMUNICATIONS

**FOR IMMEDIATE RELEASE**
**Month, Day, Year**
No. xxx
www.5borough.us

Compelling Headline
Subtitle

First Paragraph: Who, What, When, Where & WHY

Founder/CEO Quote

Additional Information

Client Quote (Testimonial)

Boilerplate

\- 30 -

Contact: Warner Johnston (917) 586-1234

San Francisco | New York
www.5borough.us

**Websites**. The following are the pages that you should immediately evaluate and begin updating.

1. **About Us**. A page dedicated to you and your senior staff with short bios and headshots. Headshots should be consistent in style (a standard backdrop/background for all and consistent outfits) and should either be done professionally or use a service like Face Tune to sharpen them up.
2. **Blog**. This is the main focus of your website during Year 1 as a blog establishes your expertise and serves as a way to capture leads. Companies with blogs receive more leads and backlinks. You will need to invest in a service that captures email addresses (some of the platforms include this in their basic package, but you can also use a service like ConstantContact, which will integrate into your website and serve as an email marketing client.)
3. **Contact Us**. How do potential customers reach you? Besides an email, you will want a telephone number and perhaps a service like Calendly that allows people to make appointments directly with you. All of this enhances your credibility.
4. **Press Page**. This might live on the Contact Us page. If not, you need a dedicated space where members of the media can be funneled. Feel free to link to other parts of your website via this page (About Us, Blog, etc.) but also include your press releases, news stories, and clear instructions on how to get in touch. Add a subscription area where media can sign up for alerts and ensure your social media accounts are linked appropriately, and you are all set.
5. **Testimonials**. Depending on how many of these you have, this may be a subpage of the About Us or a dedicated landing page. As your business grows, so shall an eager customer base who are happy to testify to the benefits of your service or product.
6. **SEO**. Search engine optimization is crucial. One of the easiest ways to determine its' success is to check whether your website appears front and center on Google. Remember, the best place to hide a dead body is on the second page of Google results. Your IT department should hopefully be on top of SEO, but if it falls into your lap, there are resources below to help you out.


**Social Media Accounts**. Pick one or two platforms that serve your type of organization and the customers you will want to engage. You don't need to be a master social media expert to get started. You can use the logo and branding from your website to customize your profile and content from your blogs and articles to generate posts, display your expertise, and engage your audiences. However, it is crucial to have at least one platform at the beginning and ensure regular posts.

Social media platforms help to establish credibility nowadays. It looks unusual when a company doesn't have at least one, and since good social media helps build brand equity, it is essential to use them. Use a service like Hootsuite to schedule posts in advance and organize all your accounts in one place.

**Story Ideas.** As you are working on your preparation, you will start generating story ideas for future campaigns. Below is a list of potential story ideas that you can keep in the back of your mind as you build your foundation.

- Throw an event
- Identify a trending topic to "*trend-jack*"
- Participate in a trendy social media holiday (National Pancake Day is one of the most popular)
- Release a new product or service
- Donate to a charity
- Conduct a survey & publish the results
- Identify new data in your customer database & pitch a story
- Celebrate a milestone
- Speak at an event
- Success stories

**Remember**. Not everything you do is newsworthy. Taking a meeting or attending a conference; announcing something from the past or making a hire. These traditionally do not generate a lot of attention. If you met a stranger at a cocktail party and explained your "news," what do you imagine their reaction would be?

**Editorial Calendars**. An editorial calendar is a vital tool to assist us in planning out major stories and events. The first calendar you create is the most difficult, but future ones will become easier to schedule.

Develop a quarterly plan with all major events and launches and work backward. Don't forget to include social media as well as key outlets that you wish to pitch. Although editorial Calendars are the province of the Comms Shop, there is merit in making them available to key staff and departments to obtain feedback, additional story ideas, and potential spokespeople.

**Reporter & Influencer Identification**. Build your media list by first looking at local and regional media and then expanding to industry media covering your sector. Review past coverage received by your organization to ensure those reporters are still assigned to that beat. Sign up for Help a Reporter Out to access new media opportunities and build your contact list. Also, look at some of the resources available below to check out some of the recommended reporter & influencer databases available.

> ***A quick word on industry conference attendance***. There is a 99% chance that your industry supports a conference perfect for you to attend. There are multiple opportunities to seek them out to increase your network, rub elbows with industry media, and raise your profile. Conferences are regularly on the lookout for presenters, and maybe your service or product would be a perfect fit. Identify and attend at least one conference in your industry sector (and hopefully your geographic area) in Year 1.

If you are on the fence about which conference to attend, see if their website includes a list of the media planning to attend or reach out to the conference organizer to obtain a list. Do a little research before to ensure that these reporters are a good fit for your business.

**Media Training & Interview Prep.** Media training should be available for all externally facing staff and all senior staff that request it. Many people are uninformed of the importance of the press and earned media, and this gives you an excellent opportunity to review the positives of successful media operations.

Holding brown-bag talks, and reviewing the Three Digits of a Soundbite, is a great way to enable your colleagues to build their skills in a safe environment.

**Important Tips**

- Work towards your headline.
- Soundbites are complete sentences with one point.
- Reporters do not typically provide questions in advance or allow review of a draft piece.
- Learn the art of pivoting and reframing.

**Briefing Outline**

You will want to ensure that your interviewee is prepped before an interview by preparing a briefing that covers the following:

- Outlet Name
- Reporter Name & Bio
- Date/Time
- Approximate length of interview
- Address
- Publication date if known
- Contact information
  - Reporter
  - Interviewee
  - Staff Contact
- Provide a list of likely questions
- Include your ideal headline and three key points you want to establish
- List of past clips

## Launch

In this section, we will cover:

- Pitching
- Press Release Distribution
- Speeches & Speechwriting
- Events

**Pitching.** Pitching is more fine-tuned than blasting a press release (which we cover in the next section.). Now that we've built a dedicated media list during our prep work, let's go over the key components and basic rules of pitching a reporter.

1. **Individualization & Customization.** You want to ensure that you are sending to the correct email address and using their appropriate name. Yes, this is obvious but oh so important. Double-check your work and never send a group email. You can create a base pitch email and cut & paste but again, double check your work and send a test email to yourself.
2. **Compelling Subject.** Customize your subject line to their beat. "*3 Trends in Summer Travel*;" "*New Data on Personal Shopping Trends*."
3. **Introductory Paragraph.** Personalize your pitch, so they know you follow their work. For example, "I loved your last story on *Emus as Therapy Pets on Planes*" or "Your latest post on trends in personal grooming really spoke to me…"
4. **Keep it short.** 3 or 4 paragraphs at most.
5. **Call to Action.** "Can I send you more information, including our latest press release or data?"
6. **Midweek and mid-morning only, please.** Never pitch on Monday or Friday unless it is breaking or trending (they published something over the weekend, and your pitch is uniquely connected as a potential follow-up). Also, don't pitch first thing in the morning or end of the day when they are wrapping up deadlines.
7. **Be careful about following up.** If I don't hear back, I wait a week with a subject that starts with "Getting back to you re: proposed story idea." Unless I know the reporter, I don't follow up with a call.
8. **Don't pitch multiple reporters the same story at the same time.** Instead, go with your first choice, and then if you don't hear back within a week after following up, move on. That being said, if the pitch is time-sensitive, I might wait a day and then follow up with an "I'm sure your busy, and perhaps we can work together in the future. I've another reporter who might be interested in this story." Be careful with this approach, as your intention is not to be aggressive, just giving them time to respond and a heads-up that you are moving on.

Hi Mary.

I'm reaching out as I've seen several of your latest articles focusing on career change during the pandemic.

Our recruitment firm services the East Coast, specializing in HR professionals. We recently ran a survey with 500 respondents on remote work and the new hybrid workplace.

We've generated some great data, including that 65% of employees state that they would leave their jobs if forced to return to the office full-time. We also see some interesting trends regarding daycare during the workday and self-care.

I'd love to provide you with some of our findings if this would be of interest to your readers.

Thanks,
Warner

**Press Release Distribution.** We've covered the benefits of the press release above. Now that you have your press release template and have generated a perfect release, what do you do with it? If you've been diligent in creating your media list, you already have one vetted group to pitch.

However, there are times that you want a wider audience as you know that your announcement is incredibly newsworthy. There are many press release distribution platforms, from Cision (one of the industry leaders and most expensive) to Muck Rack (very popular amongst a host of comms professionals.) Each will allow you to create a list of prospective media, distribute your release, track results and take notes.

There are also some niche platforms for startups and influencers (check out the resources below.)

No matter which platforms you use, you will want to ensure that you send your release mid-morning, preferably not Monday or Friday.

**Speeches & Speechwriting**

How do you write a great speech that engages and delights? If you are preparing a speech for someone, you will need to have a good grasp of their voice. Being an excellent content writer does not necessarily translate into being a good speechwriter (for instance, I can write a snappy short speech but struggle at anything over three minutes.)

To help you get started, below are the standard components of a speech.

1. **Basic Information.** Include Event Name, Location, Date & Time.
2. **Acknowledgments.** Include VIP's Name, Title & Organization.
3. **Event Notes.** Indicate speaking order & principal's role.
4. **Remarks.** Depending on speaker preference, this may either be an entire speech or bullet points.
5. **Background.** Use this section to provide any additional notes not included above.

If you are writing for someone else, you will want to sit down with them to consider what messages they want to include, who their audience is, and their most comfortable topics.

For example, some principals only want bullet points on a page, while others require a fully scripted speech on a teleprompter. After you've written a draft, sit down again with them to make changes. Ensure you know the minute count of the speech and have your principal (if they are new to speech delivery) practice one time with you while you take notes.

**Events**
Depending on the nature of your organization, you may be producing events regularly (annual general meetings, stakeholder conferences, press conferences, etc.). However, no matter the type of event, similar planning goes into it to make it succeed. Below is a list of some of the major components of events.

**Before Event**
- Confirm Date
- Invite attendees & media (create an invitation, media advisory, social media posts, etc.)
- Site Visit & Setup (podium, stage, chairs, etc.)
- Event Program
- Remarks
- Press release

**Day of Event**
- Pitch to newsdesks
- Bring copies of remarks, press releases, programs, etc.
- Arrive early

**At Event**
- Check setup
- Review program details & speaking order
- Greet media before & after; make note of attendees
- Photograph & post on social media

**Post Event**
- Edit press release as needed & distribute
- Post on website & social media along w/photos

- Share all coverage

---

## Next Steps

So, you've held your event, pitched your story, run your campaign - what's next?  First, you will need to report up to your principal the success or lack thereof. Then, you will want to sit down with your team and review what went well and what didn't. What improvements can you make for the next time? Finally, it's essential to record your efforts for future use. If you've been following the advice of this manual, then you have everything saved appropriately and a dedicated space on your website along with social media accounts to share the outcome.

You should also highlight the outcome in your newsletter.

**Newsletters**
We've already covered email marketing in the Systems & Tools dimension. These platforms will allow you to harness the power of your customer base to send out regular communications on significant events, sales and new products, or regular updates. Your newsletter may be the only vehicle in which your public hears from you, and you should ensure that it both reflects your narrative but your visual brand.

Marketing messages bombard us throughout the day, so you need to be sensitive to your public and the information you are looking to relay. Before creating and sending your first newsletter, you will need to consider the frequency of your delivery? Length? Is it mobile-friendly? Is there a call to action?

And then, on the flip side, you need to see what your open rate and click rate are, any feedback received from recipients, how well your CTA is being responded to, etc.

Thankfully, any email marketing platform will let you customize to your heart's content and let you filter recipients by any type you desire so you can ensure the appropriate message is going to the relevant people.

***Note***: Everyone responds well to visuals, ensuring that your newsletter is chock full of graphics and images (without being a slideshow.)

# 06 Online Resources

## Online Resources

The following resources include ones that I regularly use in my day-to-day (marked with an asterisk) or potential tools that I wanted to organize for future use.

**Content Generation**
**Crisis Communications**
**Comms Documents**
**Editorial Calendars**
**Monitoring Services**
**Pitching**
**SEO Resources**
**Stock Images**
**Miscellaneous**

**Content Generation**

| | |
|---|---|
| AI Jarvis | $29/month; money-back guarantee w/in 2 weeks; generates unique content using an AI |
| Content Company | $65/post + monthly plans available; utilizes copywriters to assist with your content needs |
| Grammarly* | $139.95/year; reviews writing w/multiple tools for Word, Browsers, etc. |
| Hemingway Editor | Free; reviews grammar & sentence structure |
| Subject Line Creator | Creates & analyzes the strength of subject lines |

**Crisis Communications**

| | |
|---|---|
| CDC Manuals | Crisis & Emergency Risk Communication (CERC) Tools |
| Message Maps | Download free framework for crisis planning |

**Comms Documents**

| | |
|---|---|
| Comms Plans Templates* | Visme is an excellent tool with a variety of downloadable templates |
| Press Kit Template | A great explainer of the value w/downloadable template |
| Press Kit Template 2 | Another Press Kit template w/presentation template |
| Project Charter Template | Starting a new group project? Check out this resource |

**Editorial Calendars**

| | |
|---|---|
| Asana | Free for up to teams of 15; not only editorial calendars but marketing plans can be created here |
| Welcome Marketing | More marketing-focused than Asana |
| Magazine Editorial Calendar Access | $150/month; includes calendars for many popular magazines |
| Why You Need an Editorial Calendar | Explainer on the benefits |

**Monitoring & Publishing Services**

| | |
|---|---|
| Awario | $24/month; focuses on brand sentiment |
| Cision | $7000/year; industry leader w/over 1.4 million media contacts |
| Mention | Free Trial & $29/month; monitor's competition & brand |
| MuckRack | Approved by multiple communications professionals |
| PR Attribution | Measures ROI of campaigns |
| Press Release Jet | $99/release; may not have capabilities of other services |
| Prowly | $189/month; 1 million media contacts |

| | |
|---|---|
| Comparison of Services | Compares many of the services listed above |

**Pitching**

| | |
|---|---|
| BetaList | Discover (or submit) info on new startups |
| Buzzsumo | $99/month; scans influencers |
| Grin.Co | $2k/month; influencer marketing |
| JustReachOut | Free Trial & $99/month; identifies reporters & influencers for direct pitching |
| Ninja Outreach | Free trial & $119/month; finds Instagram & YouTube Influencers |
| SparkToro | Identifies influencers to follow |
| Submit.co | Press coverage for startups |

**SEO Resources**

| | |
|---|---|
| Ahrefs | Assist with competitive link acquisition & SEO tools |
| Citation Development | Accrues mentions of your business on websites & local directories |
| Birdeye | Online review assistance |
| Callrail | Website telephone tracker |
| InvisiblePPC | White Label PPC company |
| Website Analysis | SEO Checker |

**Stock Images**

| | |
|---|---|
| Unsplash* | Free |
| StockSnap | Free |
| StockUp | Free |

**Miscellaneous**

| | |
|---|---|
| Locate Email Addresses | 14 ways to find an email address |
| CoverageBook | $99/month; creates PDF reports from online coverage |
| LinkedIn Advertising | Explainer |
| Personality Assessments | DISC assessment for teams |
| Prezly | $50/month; CMS & online newsroom |
| Upbeat Online PR | $2k/month; online PR partner |

## About the Author

Warner Johnston is a communications professional with more than 20 years of experience working with various national and international companies and governments. Beginning his career with the City of New York, he developed and managed successful communications offices, including the NYC Parks Department, the Empire State Development Corporation, and the Association of Chartered Certified Accountants USA. In addition, he has worked with top-tier national and international media throughout his career, both on and off-the-record.

His experience includes large-scale campaigns and productions, crisis communications planning and delivery, and organizational development and coaching. Over the years, he has developed internal and external strategies, served as an official spokesperson, and coached founders and line staff alike for multiple non-profit and corporate organizations.

Warner is a graduate of NYU with advanced degrees in public administration and psychotherapy. Raised in New York, he splits his time between his native city and San Francisco.

Interested in learning more about how 5 Borough Communications can assist your organization? Feel free to set up a Discovery Call here.

## Versions

| | |
|---|---|
| Version 1 | Released June 16, 2021 |