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Strategic Communication
Field, Concepts, and the Cocreational Model

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This chapter has three goals. First, it offers a very brief outline of the field of strategic communication (SC). Second, it introduces and defines key terms and concepts in SC. Third, it introduces the cocreational model that influences several later chapters. In doing so, this chapter draws on work previously published by the author in 2018, also with Wiley-Blackwell (Botan, 2018).

One challenge faced by any book about SC is that SC is practiced mostly in two kinds of organization. The first is organizations that have a primary purpose of conducting SC campaigns. The core work of an organization, what it exists to do, is sometimes called the "line function" of the organization. Examples include PR firms, advertising firms, and some government health communication agencies. "whose primary or line function is SC." For SC practitioners, the advantage of working in these firms is clear. Practitioners in this kind of organization work in an environment where the importance of SC work is highly valued when it comes to pay and promotions.

In contrast many, probably most, SC practitioners work in organizational cultures where something other than communication campaigns is the core function of the organization, its economic lifeblood. For example, they might work in a school system, digital provider, agriculture, or petroleums. In such cases, the practitioner is not at the center of the organization and is not the line function of the organization. Here SC may just be a support or staff function, as opposed to a line function. In these organizations, the value of SC work may not be fully understood and can be harder to measure than in organizations where SC is the line function. These practitioners may have to expend time and effort explaining what they do. Maybe more importantly, various kinds of SC work are often given different names. For example health and safety campaigns and HR benefits campaigns may be run out of different departments and under different names. So it can be hard to transfer ideas or employment between divisions of SC that conduct similar campaigns under very different names.

Strategic Communication Concepts and Terms

The term strategic communication may often be used mistakenly simply because it is a modern buzz term of the first rank. It is also sometimes intentionally used for puffery, or to make one's work product sound more important than it really is, thus allowing them to charge more than

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if the term "strategic" were not used. It can also be used in good conscience by someone working as part of an SC campaign, such as a large marketing campaign, who mistakenly assumes that if they are working on a large complex campaign it must be strategic.

There is no one simple test, no single line to cross, in creating or identifying a strategic versus non-strategic campaign. But there are some key concepts that can be used to differentiate strategic from non-strategic communication campaigns. The next part of this section discusses six key concepts: information, strategic information, strategic communication, grand strategy, strategy, and tactics. Then, the relationships between the latter three.

Information

Information has been defined in many ways, for example Buckland (1991) distinguishes between information as process, information as knowledge, and information as thing. However, the most useful definition for those in SC is probably the very common view that information is something that reduces uncertainty (Daft & Lengel, 1986; Grahramani, 2006; Shannon & Weaver, 1963/1998). For example, if someone comes to you and tells you something you already know that does not serve as information to you but if they tell you something you did not know that provides you with new information by reducing your degree of uncertainty about a fact or situation.

Strategic Information

One issue that remains is that not all information contributes to any one SC campaign because not all uncertainty reduction applies to any one SC campaign. The uncertainty most important in SC is that which directly addresses the strategic needs of a campaign, particularly that which reduces uncertainty about how the publics think and feel about a client and the relationship that the client shares with their publics. This information has strategic value to a campaign planner, so it can be called strategic information to differentiate it from facts or data about things that do not impact the relationship between a client and publics.

Strategic Communication

There are many kinds of communication, which again, not all of are strategic. Here the term strategic communication is reserved for campaigns with two minimum characteristics. First, research is conducted about the environment and the situation in which a campaign is to be carried out. This research has to assess, again at a minimum, the current opinions of the significant publics including an assessment of how the purpose, or goals, of a proposed campaign comport with the reality on the ground. Second, a plan is developed encompassing available resources, timing, sequencing of steps, and assignments that takes into account both the goals of the organization and the feelings, needs, and attitudes of the publics. This plan is the actual strategy. A third possible characteristic is some kind of evaluative process centered on assessing differences between the starting and ending views and plans of the relevant publics. This is not strictly necessary for SC to exist but it is for skills to grow, and changes in the publics and external influencers to be adjusted for. Such an evaluation often also constitutes at least part of the research phase for another future campaign. The actual definition of SC used in the 2018 book is that

> SC is the use of information flowing *into* the organization (research) to *plan* and carry out a communication campaign addressing the relationship between an organization and its publics. SC is research based and public centered rather than organization or message centered. (p. 8)

Further distinguishing between grand strategy, strategy, and tactics may help better explain the terms used here.

Grand Strategy

Grand strategy is the setting of policy, treaties, goals, and the like and is most easily seen in the case of a nation. Grand strategy is the domain of high government bodies that make treaties, set out policies, delineate goals, and apportion budgets. These act as directives for subordinate bodies such as the military and various ministries or departments. By analogy, in organizations where most SC campaigns are conducted, the policy level is the Board, CEO, President, or Executive Committee. These also set out policies, delineate goals, and apportion budgets, and set other parameters for SC campaigns that are conducted at the next level.

Strategy and Tactics

The literature on strategy is written from perspectives as different as business, military, religion, and politics, so it is not surprising that some authors might disagree on what strategy is. For example, although some have sought to draw a distinction between strategy and a plan (Mintzberg, 1994), many more tend to use the terms almost interchangeably. For most, a strategy is a plan, authorized by a decision at the policy level, the building of which takes into account at least current circumstances or conditions, a goal, and a set of steps for getting from the current situation to the goal. For example, Kay, McKiernan, and Faulkner (2003) state: "the definition of the objectives of the firm is the key to strategic formulation" (p. 28), which involves "information which a company can assemble about its environment and about itself" (p. 25).

As it is used in SC, we can define strategy as "the campaign level planning and decision making involving maneuvering and arranging resources and arguments to meet the needs of publics and organizational grand strategies" (Botan, 2018, p. 14). One could also think of strategy as a roadmap on which a plan for a trip can be laid out, while the actual driving is the tactic used to carry out that plan. Strategies are only a plan, an idea. It is the tactic that gives them substance. Thus, a strategy is not "better" or "higher" than the tactics because a plan is only an idea, without substance, unless given form and function through tactics.

Thus, tactics can be defined as "the specific activities and outputs through which strategies are implemented – the doing or technical aspects" (Botan, 2018, p. 14).

Relationship of Grand Strategy, Strategy, and Tactics

The relationship between grand strategy, strategy, and tactics is based on understanding level of analysis. Strategic communicators work at the level of the communication campaign. Grand strategy is a property of the higher policy level in relation to our campaign. Tactics are the actual implementation of the parts of a plan, so tactics are, in turn, subordinate to strategy. One's position in this relationship, so strategy is subordinate to grand strategy can alter what is seen as strategy or tactics. For example, a higher authority may assign an SC department to plan a campaign that is strategic-level work for the SC department but maybe just tactical-level work from the perspective of the higher authority. Put another way, the level of analysis can differ depending on one's position and role in a hierarchy but the level of analysis for SC itself does not vary, it remains at the campaign level.

Thus, strategy gets it guidance from the policy (grand strategy) level and strategy can have one or several subparts that can be thought of as sub-strategies. However, the only strategy or sub-strategies created should be necessary for addressing the policy in question. There should not be any of what I call "orphan strategies," sub-strategies that are not directly part of responding to

the policy/grand strategy. Likewise, a strategy may require from one to several tactics to implement it. However, there should never be orphan tactics that do not directly implement one or more strategies.

Finally, we can think of authority as moving downward from the policy level to the strategic level, and finally to the tactical level. Each is subordinate to those above it. But we can also think of concreteness, or "reality," as flowing upward. Without actual tactics being applied both strategy and policy are just ideas, or wishes, without substance of their own.

Cocreational Model

Background

Botan and Taylor (2004) and Taylor and Botan (2006) introduced a model that they hoped would be the starting point for a change of assumptions and attitudes for many practitioners of SC. This cocreational model did not introduce new parts of the relationship with publics but was an attempt to depict what the present author had learned in the practitioner phase of his career that had changed his assumptions about the importance of some parts of that relationship. These authors sought to advocate a fundamentally different way of thinking about SC campaigns. In this sense, the cocreational model is close to serving as a normative theory in the way that Strough, Parker, and deBruin (2015) used the term when they said a normative theory is characterized by offering prescriptions or recommendations. Normative theories, they said, define "good decisions as one that most likely … provide the decision maker with [the] desired outcome" (p. 235).

Cocreational Scholarship

The cocreational school of thought was originally presented as a way to summarize the shift we thought we saw occurring in the literature over the last quarter century or so, saying "view[ing] publics as cocreators of meaning and communication is what makes it possible to agree to shared meanings, interpretations, and goals" (Botan & Taylor, 2004, p. 652). Publics, then, cocreate new meanings both individually and as publics by using their own knowledge and experience and the information they get from campaigns. The key aspect of this process of meaning cocreation is that the collective knowledge and experience of a public far outweighs the content of any one, or even many, SC messages in the meaning-making process in which publics engage. Indeed, as the line thicknesses in the modified cocreational model shown in Figure 1.1 suggest, except in rare circumstances, an SC campaign might best be thought of as accounting for no more than 10% or so of the outcome of that campaign – and often far less.

Marketing communication, in particular, has seen some of its followers embrace the idea of value cocreation. From this marketing perspective, value only comes into being when publics give a good or service value by buying it (Bhala, 2010; Edvardsson, Tronvoll, & Gruber, 2011; Prahalad & Ramaswamy, 2004a, 2004b, 2004c; Vargo, Maglio, & Akaka, 2008). These authors have used a publics centered view of value as the outcome of most interest in marketing by suggesting that whenever a product is brought to market, the producer is essentially asking if any public sees value in it. No takers means no value and those products may have to be written off. (The value other publics cocreate in other SC specialties, such as health communication, may be deciding to adopt new health behaviors rather than buying a product.)

Additionally, as I said in 2018:

> Health Communication has also contributed [to] cocreational work done, although much of it is marketing oriented. For example Nambisan and Nambisan's (2009) article, "Models of Consumer Value Cocreation in Health Care" is clearly marketing oriented as is McColl-Kennedy et al.'s article from 2012, "Healthcare Customer Value Cocreational in Practice Styles." Halkes' (2014) publicly available PowerPoint presentation is a little less marketing focused even though the author describes themselves as a consultant to pharmaceutical firms. There has also been non-marketing oriented work in Health Communication such as Elg et al. (2012) and Wallace et al.'s (2012) book *Cocreating Health: Evaluation of the First Phase*. Some works in the general field of communication (e.g., Stadler, 2013) also use the Corporation construct. (p. 42)

Thus, the cocreational view is far from new and has been used in various ways for some time. Indeed, scholarship in business management has used the term, and the concept, in the same way as it is used in this chapter for some time.

The cocreational view recognizes that there are many relationships of interest to public relations, some more important than others. But the relationship of central importance is the shared creation of meeting between members of the public. Further, the cocreational view sees what publics think and feel as the starting point for strategic planning in communication. Therefore, the cocreation view can also provide a scale by which to evaluate other theories in SC. The cocreational view asks how well a given theory opens a window into the social meaning-making process going on within publics, as well as between organizations in their publics. In this sense, the cocreational view can play the role of a meta-theory – a theory about how to evaluate other theories.

Cocreational Molecule

This final subsection of the chapter presents and explains a visual model of the procreational molecule (Figure 1.1). The molecule metaphor is used because others have used the idea to explain aspects of communication (e.g. Bradac, Mulac, & Thompson, 1995), and because many things with multiple parts or relationships can be a bit hard to understand as a whole unit without a visual depiction. Additionally, a molecule is the smallest way to depict a complex whole and all its constituent parts.

As I acknowledged in 2018, the elements of the cocreational molecule are not new, but what is new is the realization that (a) the publics are the main force in SC because theirs is the decision-making role and (b) the essence of strategy in SC is planning based on knowledge of the "lay of the land" – other forces in the environment and how these factors interact with each other and the resources, capabilities, and history of the planner (Botan, 2018, p. 47).

The molecule has three kinds of element. Circles represent behaviors of publics, while rectangles depict organizational behaviors, and lines represent the relationship between elements. The rectangle around boxes 2, 3, and 4 represents what the SC practitioner and client can control, or at least directly influence. Thus, the practitioner only controls, or directly influences, a part of the overall relationship. Suggesting otherwise to a client can be an ethical issue, and a client hoping an SC practitioner can do more than that is, at best, naive.

Circle 1 depicts a public before the organization begins to act. There is information, perhaps strategic information, available about both individual and group meanings, goals, beliefs, values, and views about the public's relationship with its environment, including the client. Note the three lines emanating from the public to the parts of an SC campaign that the publics can influence. The dashed line from circle 1 to box 2 indicates that research is often missing

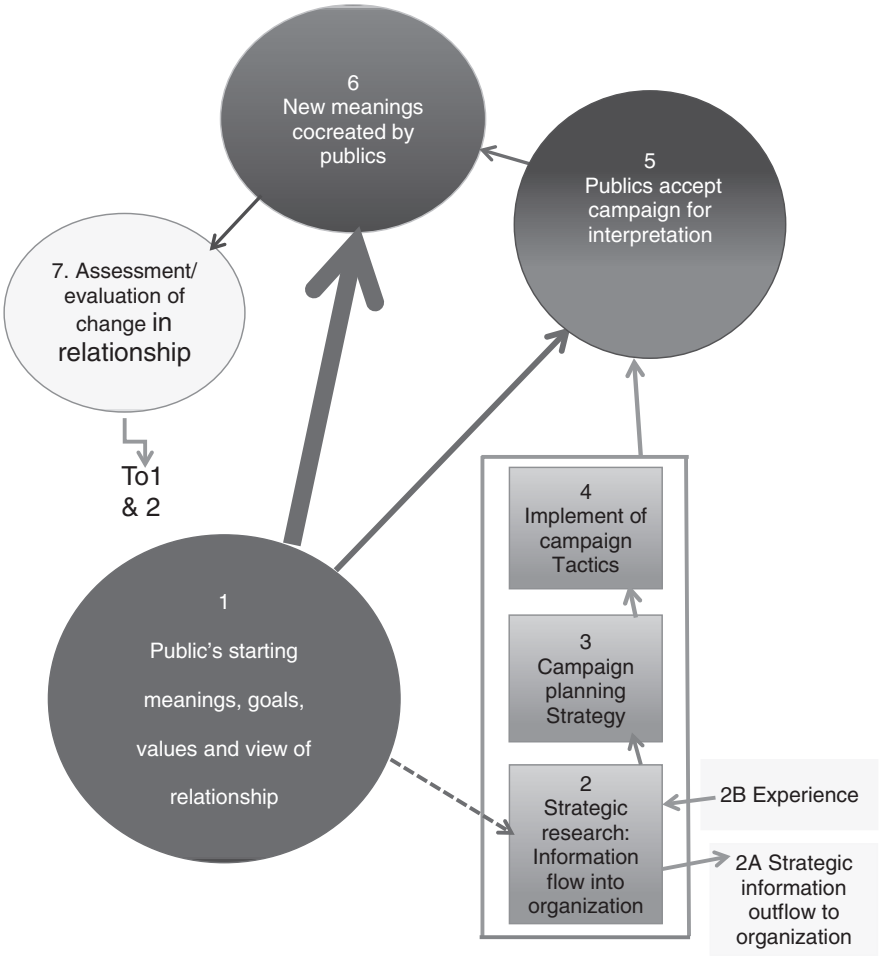

Figure 1.1 Cocreational molecule.

in campaigns, particularly those based on the deficit model (see Chapter 16) which privileges the knowledge of campaign sponsors and often lacks in publics centered strategy. Other times research may be limited to just experience from past campaigns or perfunctory research. Publics constantly evolve and change over time so even experience, which is of great value in SC, can become stale if not refreshed by new research periodically. To serve a strategic function, it is often wise for research to include some open-ended qualitative items in which publics have the opportunity to express what is on their mind, in addition to items designed to elicit information on things the researchers want to ask about.

The narrow arrow from box 4 to circle 5 depicts the sole point at which the practitioner can influence the meaning cocreation process of publics. The narrowness of this line compared to the three lines emanating from circle 1 *combined* roughly reflects how much influence an SC campaign has on the outcome compared to what publics bring to the final decision-making process. In this case, the practitioner influence is about 1/10 to 1/8 as strong as the influence publics bring to the relationship. These approximate arrow sizes were chosen to roughly reflect that the published literature reports on the actual success rate of several kinds of campaign (see Botan, 2018). The meanings publics share about their relationship to a campaign's content and sponsors before the campaign starts are typically the single best predictor of what

the results of the campaign will be, regardless of how skilled the practitioner is or how much media coverage is earned or paid for.

This does not mean that the experience (box 2B) and insights of seasoned practitioners are unimportant. Again, experience is very important, in part because it often suggests some familiarity with how publics think and feel on a subject, possibly because experienced practitioners may have learned from both successes and mistakes earlier in their careers. Understanding how one or more publics are likely to feel about a particular campaign is part of the "art" of the SC that comes from experience.

Box 2A represents the sharing of strategic information gathered in the SC process with other elements of the organization, including the leadership responsible for overall organizational policy making, and is a kind of strategic information as discussed earlier in this chapter.

Campaign planning for box 3 is where the actual plan/strategy is developed. This, like any strategy, is essentially a new mini-theory about how best to get publics to attend to a campaign and then be influenced by it. The strategy includes "the logic of a campaign; *what* is to be said, *how* it will be said, in what *order*, to *whom*, and *when*" (Botan, 2018, p. 5). After all, it is still publics that decide whether these new mini-theories are adopted or rejected.

Box 4, campaign implementation, is the tactical component (i.e. units of work) in a campaign and is typically the only part of the campaign that publics experience and can also respond to. Thus, it represents the practitioner's sole bite at the apple. Some practitioners discussed above sometimes try to jump straight to this box because they believe they know what is best for these people, so content decisions only have to be based on their own expertise. This assumption is often partially responsible for unnecessarily poor success rates.

After publics see, or hear, campaign contents they issue their first verdict – whether they understand the campaign and accept it enough to invest time and effort into paying attention to it and understanding it (circle 5). Some campaigns fail to pass this first hurdle and, so they, have no – or virtually no – potential for success. Many publics today live and work in a dense fog of SC campaigns from commercial advertising, to guidance or directional messages, to the often breathless claims of political messages and social or religious campaigns. Thus, many members of publics use this first campaign hurdle to eliminate 90% or more of campaigns from their consideration; so understanding this stage is almost a necessary survival skill. SC campaigns in emergency situations may be able to adopt a "this is what you need to know from us" strategy in their campaigns, but they still have to pass the test of whether publics agree with them enough to attend to the campaign.

Actually deciding whether to accept the campaign (circle 6) is strictly the domain of publics. The SC practitioner already got their bite at the apple when they converted their strategy into tactics and presented their campaign. From then on, publics decide how well the campaign content, *and* the relationship implied in every campaign, fit with their own experience, values, and goals and, by mixing the contents of the campaign with what they brought to the relationship, create new meanings (using a mix of maybe 90% their own ideas, values, and experiences with maybe 10% campaign content). Of course, these decisions serve as a kind of campaign evaluation for publics and then constitute part of circles 5 and 6 for the next campaign from that campaign sponsor or on that topic. Thus, a poor choice of strategy, and therefore poor tactics, in one campaign prejudices a succeeding campaign's chances of success. Thus, as important as researching publics before determining strategies and tactics is, it is even more critical if the sponsor hopes to develop a relationship with that public or to revisit the topic with that same public. This is part of why campaign assessment by practitioners needs to include qualitative and quantitative elements, both for reporting to campaign sponsors and contributing to detailed planning for the next campaign. Note that while some very good practices, such as message testing, are useful in boxes 3 and 4, and may contribute to evaluation, of circle 5 they do not constitute a thorough evaluation in and of themselves.

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