

Dal Bled Manifesto al Governo dei Sistemi di Relazione

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E' il testo di un poster redatto alla vigilia dell'apertura ed esposto all'annuale congresso di Bled (Slovenia) del 2002, il più importante evento europeo del settore.

Il poster si propone di integrare le suggestioni culturali e professionali del Bled Manifesto con il Governo delle Relazioni, approccio operativo sviluppato e sostenuto dall'autore

Introduction

The Bled Manifesto first appeared in early 2002. It is an English language text authored by Betteke van Ruler and Dejan Vercic, and possibly represents the most advanced state of the art dissertation in respect to theoretical research in public relations in Europe.

Starting from the conclusions of a three-step Delphi research, initiated in 1999, and which involved the active participation of researchers and professionals from 24 countries, the text studies whether there exist typically European specificities in the interpretation and practice of public relations and, if so, what characterizes them versus the Anglo-Saxon model that still today prevails in this field.

The Bled Manifesto, however, contains a great number of interesting points, amongst which a detailed linguistic, historical and cultural examination of how the term "public" in Europe (as part of the expression public relations) is specifically connected to the concept of the public sphere in Habermas, in contrast to the prevalent and consistent Anglo-Saxon enunciation of "public" merely as influential audiences.

The Bled Manifesto also delineates four different professional profiles of public relations: reflective, managerial, operational, and educational.

1. Reflective:

this is the professional profile that analyzes, updates, and discusses the dynamics of models, values, and viewpoints with other components of an organization's dominant coalition.

It deals with organizational models, values, opinions, and aims at developing both the mission and the strategy of the organization.

2. Managerial:

this the professional profile that creates communication programs developing relationship with influential audiences in order to gain trust and/or reciprocal understanding.

It deals directly with decision makers (and respective influentials) of the public policy process, media, and opinion leaders.

Indirectly, it deals with customers and market influentials (to support marketing), together with other opinion leaders and influentials (internal and external, supporting all other organizational functions).

This profile is aimed at executing the organization's mission and strategy.

3. Operational:

This the professional profile that delivers tools in order to improve the organization's communication.

It is tied to services and aims at executing plans, usually designed by others.

4. Educational:

This is the professional profile that assists components of the dominant coalition of an organization in becoming competent communicators in order to fulfill the expectations of respective relationship systems and of the organization in general.

It is tied to culture and behavior and aims at internal as well as borderline publics.

Since the operational (Relazioni Pubbliche, by Emanuele Invernizzi, vol.1) and managerial (Relazioni Pubbliche, by Emanuele Invernizzi, vol.2) profiles have already been largely explored in Italy, this paper aims at better understanding the remaining two functions: the reflective and the educational.

This effort also serves the purpose of verifying whether the development and adaptation of a particular operational methodology of public relations, known as Gorel (relationship management) - initially elaborated in Italy in the late eighties and later revised taking into account recent studies by James Grunig - may be held as consistent and able to integrate itself with a further hypothesis of an executive dashboard, designed to supply top management with a synthetic and periodic 'photograph' describing the dynamics of relationship systems between an organisation and its priority stakeholder groups.

The assumption is that public relations is a management discipline and that it intends to develop and manage conscious, programmed, interactive and symmetric relationship systems between an organization and its stakeholders: subjects who are aware and interested in a dialogue with the organization and whose behaviors, opinions, and decisions are capable of accelerating or delaying the achievement of pursued goals; and between the organization and influentials: subjects who are not necessarily aware nor necessarily interested in a dialogue with the organization, yet whose behavior, opinions, and decisions are believed by the organization to accelerate or delay the achievement of pursued goals.

The distinction between stakeholders and influentials is relevant since the communicative model that may be applied is rather different if the objective is a relationship with a conscious and interested party or a relationship which takes place with a party that is neither conscious nor interested.

How public relations is normally performed

The activity of public relations is generally realized through a continuous flow of actions - normally communication activities - which involves the identification of variables (internal/external) whose dynamics influence the achievement of the defined objective. This occurs for every specific objective pursued by the organization, which is itself defined after the active listening of stakeholders' expectations.

The flow proceeds by listening to audiences believed to be influential on the dynamics of the identified variables; continues with the definition of key messages; a pre-test analyzing levels of familiarity with the messages' content, and of credibility/authority attributed to the message source; the design and implementation of specific relational initiatives.

The flow ends with yet another listening phase which measures the effectiveness of implemented activities, thus simplifying the design/realization of new ones.

The term continuous flow of actions underlines the operative function of public relations.

Too often public relations professionals, frustrated because normally used in “tactical” circumstances, have abused the term strategic, giving the impression of wishing to alienate themselves from their operative role.

If the above premises are true, and if the arguments so far seem convincing, the strategic role of public relations within the organization is obvious and does not deserve further underlining.

Yet in order for this role to be recognized by others as well, it is imperative that the function demonstrate with measurable criteria -shared by the dominant coalition- its capacity of facilitating the achievement of an organization’s objectives.

The flow is continuous and goes through four macro-phases:

- Listening
- Designing
- Implementing
- Listening

a) the listening macro-phase is active, on the field

It is, by definition, an intensive and important relational phase which provides the organization with essential elements in order to clearly and consciously define ends and objectives, and to help in deciding communication policies, messages, and activities to be undertaken. Following a careful listening phase, even the objectives may themselves change, sometimes substantially.

b) the second macro-phase is designing

According to specific and well-defined goals and objectives, and on the basis of the results of the previous listening phase, a relational strategy is designed adopting partially predetermined and shared parameters.

The strategy normally foresees the use of appropriate communication tools, and is believed to be more efficient in contributing to the achievement of goals compared to possible alternatives.

c) the third macro-phase is implementation

It simultaneously extols the creativity and relational/communicative abilities of public relations. As we will see, the available resources (human as well as financial) are always limited by definition, and the challenge consists not only in producing initiatives which help the organization in achieving an objective in the best possible way, but also in implementing such initiatives with the best cost-benefit ratio.

d) the fourth macro-phase, listening, is as crucial as the previous ones

- because, as any other management function, public relations needs to demonstrate its ability to achieve measurable results;
- because, having to deal mostly with relationship systems whose dynamics are by definition ultra-fast, it is almost certain that restarting the cycle will inevitably lead to a revision of goals and objectives, and hence of variables, stakeholders/influentials, design, and even implementation.

The four described macro-phases correspond, by enlarge, to the best operative practice of public relations, and find viable application goal by goal, campaign by campaign.

The Gorel methodology

The role of public relations however remains essential, as we have said, in the coordination of the entire organization's relationship systems: it performs, in fact, a function of executive dashboard of dynamic indicators, able to ensure a homogenous and consistent governance of relationships with all priority stakeholder groups.

In practice, the roles of utmost importance of public relations within an organization are:

- to actively monitor, with consistent and shared methods, the dynamics of relationship systems with stakeholder groups, providing management with a system of periodic surveying capable of measuring, through preagreed indicators, the organization's performance in respect to the achievement of goals as well as of pursued objectives;
- to assist, by coordinating all communication tools and channels, other organizational functions in a shared and coherent development of their respective relationship systems.

In brief, it clear we are here dealing both with the reflective and the educational function as described by van Ruler and Vercic in the Bled Manifesto.

The elementary and scrap-book methodology we present also uses and integrates the other two more traditional roles as suggested by the authors of the Manifesto -the managerial and the operative ones- since both are coherent with the four macro-phases described sofar.

This is why it is called Gorel, or relationship governance.

Gorel intends to be a draft, a scrap book attempt, to assist professionals in rationalizing the different phases in which public relations activities take place. It is, by definition, an attempt in evolution and needs to be adapted by the operator each time it is used, according to the specific circumstances.

Thus, for example, if one wishes to apply James Grunig's model – the interactive and symmetric one – it is necessary for the operator start off the method with different modalities as compared to a situation in which one decides to apply Ed Bernay's model – defined scientific persuasion.

In a word, Grunig argues that an organization should listen to its stakeholders before setting pursued objectives as the listening phase has to do with organizational objective, whereas Bernay argues that the listening of influentials and stakeholders occurs after pursued objectives have been defined as the listening phase has to do with organizational communication expectations.

Also, the reader must take into account that neither of the two distinguish between stakeholders and influentials, whereas we very much do.

The difference between these approaches is substantial and has much to do with the very nature of the field in which public relations is called to operate.

We could argue – although this might appear overstretched – that issues tied to specific market issues may be approached using Bernay's model, especially (but not only) when dealing with fast moving consumer goods and/or when one wants to support marketing by underlining direct customer

relationships. On the contrary, “corporate issues” or institutional ones are best dealt with by applying Grunig’s model.

As we will see, the development of our proposed methodology does not change, except in its very early phases. In fact, the first two steps of the Gorel are mandatory only when using Grunig’s model (even though they are extremely useful, yet not essential, when using Bernay’s model).

Gorel’s ten steps

1. (only for Grunig) envisioning

The first step is to identify and agree the goals which are at very core of the organization’s existence: what we define as the *mission* (what we are today), the *vision* (where we want to be in 3/5 years), the *guiding values* (what behavioural principles will I adopt to go from mission to vision), and the *strategy* (how we intend to go from mission to vision).

For example: not “Fiat manufactures cars, wants to manufacture and sell more of them and will achieve this by developing new technologies, comfort, and its very marketing capabilities”, but “ Fiat deals with mobility, intends to dedicate itself to people in order to develop a sustainable mobility, by developing technologies, comfort, and marketing capabilities”.

Responsibility for “envisioning” is usually entrusted to the organization’s dominant coalition, and is often the result of its collective work. Coordination of this effort may be claimed by different functions: the ceo, the coo or by public relations, human resources and even marketing.

The decision depends mostly on the organization’s specific culture.

It is however fundamental, for reasons we will discuss later on, that the public relations director be an integral part of this stage.

2. (only for Grunig) stakeholders

Once the result of the envisioning phase is shared by the dominant coalition, the second step is to identify and listen to priority stakeholder groups: subjects who are aware and interested in dialogue, and whose behaviours, opinions, and decisions may accelerate or delay the implementation of the organization’s strategy ensuring its transition from mission to vision.

Normally, stakeholders are executives, workers, shareholders, suppliers, allies, institutions, media, distributors, unions, relevant civil society and activist organizations (consumers, environment, health, territory)...in brief, all those who contribute to the reputation of the organization and grant or revoke an organization’s “license to operate” in civil society.

Each organization, taking into account the results of the envisioning phase, will identify different stakeholder groups.

This listening phase can occur in an analytical way (analysis of relevant documents, literature, behavior tracking, and so on) and/or in an active way (with interviews or research, adopting informal and/or formal modalities – such as panels, focus groups, seminars, workshops, meetings, telephone calls, letters, electronic communication etc...).

The aim of this first listening phase is to understand specific stakeholder needs and expectations which have consequences, directly or indirectly, on the organization's goals, and take these into account, either by integrating them, or by choosing to deliberately ignore them, knowing in any case they will most likely emerge during the implementation phase of the defined strategy.

It is only obvious that this activity of "stakeholder groups active listening" must be constant and must also take into account their respective and specific dynamics.

3. definition of pursued organizational objectives

The third step consists in identifying the specific objectives pursued by the organization, whose achievement are believed to be facilitated by the use of public relations.

For example: not "in order to increase my market share I think it is a good idea that we have an article in the newspaper to try and influence consumers", rather "in order for the company to grow, we need to increase our market share".

Often, top management as well as public relations operators forget to clarify this point. In fact, their attention is mainly focused on communication objectives, which as we will see come later on downstream. This habit often causes confusion.

Sometimes, the organization's objectives are well defined and written down. Sadly, this is not always the case.

It is therefore essential for the public relations operator, before starting her/his relational and communication activities, to write them down in a few sentences and request confirmation by the dominant coalition.

Of course objectives will be defined this taking into account those stakeholder expectations singled out in the previous step, especially if stakeholders are directly or indirectly involved.

It is critical that the text be written, as this allows the dominant coalition to fine-tune, give further details, add, cut, adjust...

Often in these circumstances nuances are critical.

4. variables

The fourth phase is the identification and the analysis of social, political, economic, technological, and psychological variables which influence the achievement of each specific objective. Obviously, only a few of them will be a priority and, amongst these, not all will be equally influenced by a conscious and programmed public relations activity.

For example: the dollar/barrel ratio is extremely important for a firm such as ENI. So is its workers' motivation.

However, it is hard to imagine that a conscious and programmed public relations activity by ENI may substantially influence the dollar/barrel ratio, whereas it is much more likely that it may influence its workers' motivation. Hence the operative focus of public relations attention will be on the latter, and in this specific case, in full accordance and collaboration with the human resources department.

5. *influentials*

In the fifth phase, for each specific identified objective and for each relevant variable, it is necessary to identify influentials who are not necessarily aware of, nor interested in dealing with the organization, but that the organization itself believes are critical to the variables which influence the achievement of the pursued objective.

It is likely that influential groups may overlap for many objectives, but it is just as likely that there will also be influentials who are very specific, and their weight will probably change from group to group. For example: journalists are certainly influential for stylist Gianfranco Ferrè not only in achieving the objective “I want fashion shows in Milan to grant great success to my collection” but also for achieving the other objective “I would like a new financial partner”. What is certain is that in the first case, fashion journalists will count more than journalists specialized in finance or economics, while in the second case, roles are inverted.

The first five steps of Gorel (which all belong to the first macro-phase of listening) allow the operator to well understand:

- a) organization goals
- b) priority stakeholder groups needs and expectations
- c) specific objectives to be pursued
- d) priority variables which influence those objectives,
- e) and for each of these
- f) influentials who influence the dynamics of those variables, thus simplifying or hindering the achievement of the pursued objective.

For example:

I teach and my goal, through my teaching, is to contribute to the development of a correct way of applying and understanding public relations.

My priority stakeholders are students, other teachers, and professionals.

Their needs and expectations are that I be capable to create sufficient awareness among students so that they will be one day be competent.

My specific objective right now is to explain how Gorel works.

Among the different influential and relevant variables which impact on my objective are:

- a) your personal attention
- b) my clarity in explaining the various steps
- c) time and tools available

In respect to each of these variables, influential subjects change.

In fact for the first one (your personal attention) a strong influential subject is your neighbor. As far as the second is concerned (my clarity) a strong influential subject is that girl sitting in the third row who is distracting me. While in respect to the third variable (time and tools available) influential subjects are my verbous colleague who forced me to start this session late, and the technician who did not check the proper functioning of the slide-projector.

Naturally this example is very simple, but is useful to understand the whole concept, considering that even the most experienced professionals have a tendency to tackle immediately influentials, regardless of pursued organizational objectives and of external variables which influence the result. Normally, the first thing that an operator does is imagine an event or a press release to deal with any problem. It is rare that one asks oneself “What is the real objective of my customer?” or “What must happen in the external environment for this goal to be achieved?”. If one did so, we would certainly be less overwhelmed with useless events and with press releases that infest newspaper mailboxes, and which more than often end up being thrown away, or worse, being published by error, hence contributing to the “communicational pollution” which is our responsibility as operators and our pain as readers.

6. key messages

The sixth step of Gorel is represented by the definition of key messages.

It is the phase during which we put ourselves in the influentials shoes, in order to imagine the most effective manner to build a lasting and rewarding (for both) relationship...

What could be the key message that, if solidly anchored in his mind, would facilitate the achievement of the objective I am pursuing?

Following the example I just made, it is clear that:

- a) if the technician is convinced that the quality of the projection was essential, say, for his career advancement;
- b) if the colleague who caused me to be late had it clear in his mind that, say, I will grant him that favor he wants only if he will not cause me any more delays...

Hence, regarding the two influentials identified for the third variable, the messages could go something like this:

(for the technician) the quality of projection is important to the professor, to the extent that if I ensure it I may count on his help for my career advancement;

(for the colleague) I understand that the professor wants to start his class on time, to the extent that he will grant me that favor only if I do not bother him and help him in accomplishing his desire.

But – this is essential – in order for the message to be effective, it is necessary that the receiver be already somewhat familiar with it (where possible) and that the source of the message be credible.

Thus, it is possible that the first message will not be effective because the technician knows my help will not be a determinant factor in ensuring his career advancement. No matter how much effort I put in convincing him, I will not be successful.

On the other hand, these two indicators (context familiarity and source credibility) may be complemented by other indicators according to each specific situation.

Certainly, a message whose context is absolutely not familiar will likely fail in attracting the influencers attention (even though this may happen sometimes), just as much as it is likely that a

message will not pass if the source is not held credible by the receiver (which also may happen from time to time).

We must also add that the above indicators offer a vision of public relations as being principally “confirmative” (in respect to context familiarity) and “affirmative” (in respect to source credibility). It is not very frequent that a messages context is familiar and, simultaneously, its source is credible: the public relator’s professional ability consists in balancing the source-message mix in order to ensure the attraction of the influential’s attention and dialogue-opening response.

In complex organizations (corporation, association, public institution) the careful wording and management thinking towards defining key messages – which, if they were in the influential’s mind would make the achievement of an objective faster and less costly – are normally highly relevant, yet extremely rare and patchy at best...

7. the pre-test

Let us now illustrate Gorel’s seventh step, which involves a pre-test of key messages.

This is critical above all (but not only) because it allows the definition of quantitative and qualitative communication objectives.

By adapting normal research, it is possible to survey representative samples of influentials’ universe and thus define the levels of knowledge and credibility attributed to message content familiarity and source credibiliyt of each predefined message.

I will now skip specific technical and operative aspects of this stage, in order not to distract your attention away from Gorel.

It is sufficient to know that the final result of this phase signals knowledge and credibility levels of each message and source, and that this information allows not only to appropriately adjust those very messages before communicating them to the influentials’ universe, but also to define with employer/client specific communication objectives, qualitative and quantitative, and – as we will see – measurable.

8. the operating strategy

It is now time to decide which resource are available and in what quantity, as well as the modalities, the channels, the time span and the tools necessary to communicate the message(s).

This is the eighth step, the operating strategy.

Very often, public relations in organizations start precisely from this point. The first six steps are summed up in what is called a brief, and the seventh (the pretest) is simply skipped.

This shortcut is not recommended, especially for those who work inside the organization, for those who belong to top management groups and wish to perform a strategic role.

In fact it is certain that, exceptions aside, the quality of a public relations activity may be measured through the care dedicated to knowing an organization’s goals, listening to its stakeholders, understanding the pursued objectives, analyzing variables thoroughly, identifying influential subjects precisely, and formulating messages with essentiality, creativity and synthesis.

The operating strategy is, in practice, the ways which the organization decides to adopt in relating with influentials, on the basis of the objective it intends to pursue.

Normally, the organization faces different strategic relationship alternatives, each of which present pros and cons which need to be analyzed with carefulness and attention – which is called swot analysis (strength, weakness, opportunity, and threat).

The only thing one must certainly not do is to implement several strategies simultaneously: this creates confusion and counterproductive complications.

It is necessary to choose one of them, possibly keeping a second one “on reserve”, just in case one realizes quickly that the first strategy does not work as expected.

9. the implementation

Once specific communication objectives have been set, one must transfer the messages to influentials in order to attract their attention and engage them in dialogue: this is the ninth step of Gorel.

This stage, absolutely central to the process, is already well known and has to do with the profile that van Ruler and Vercic define operational.

Besides, the range of possible initiatives to “thematize” a message is practically infinite and so is the one for attracting the attention of influentials, reinforcing or modifying an opinion or behavior. The only limitations are represented by the operating strategy chosen during the preceding step, which in turn is prejudiced by resources, financial and human, available time spans, usable channels, and complexity of messages to be transferred.

For the time being, and only in a general sense, it is possible to confirm that, as we have seen at the beginning of this paper, public relations are *horizontally* accomplished via the creation and organization of activities which develop a relationship with opinion leaders, with media in order to obtain a multiplication of messages, and with the public policy process to orient favourable decisions, while *vertically* public relations include numerous sub-disciplines referring to different segments of influentials. In normal circumstances these are:

- a) corporate pr: addresses the organization’s totality of institutional stakeholders/influentials;
- b) marketing pr: addresses all stakeholders/influentials involved in the marketing process (sales forces, distributors, consumers, and related influentials);
- c) financial pr: addresses shareholders, investors, regulators, financial market operators;
- c) industrial pr : addresses unions, industry associations;
- d) internal pr: addresses employees, collaborators, suppliers;
- e) public affairs, lobby: addresses public institutions (national, regional and local), processes and actors of legislative and regulatory bodies;
- f) international affairs: addresses organizations, institutions and national, supranational and international subjects...

and many others who may vary according to the specific organization’s culture and tradition.

In parallel, there are also several specialized functions such as:

- a) analysis, study, planning, and control: this is the intelligent database, the think-tank that collects, listens to, and organizes relevant available information; it is where specific action design guarantees coherence to the whole; it is the administration that ensures a programmed distribution of resources; it is the certification that measures results;
- b) media relations: prepares, distributes materials and relates to all those media who are interested in – or are interesting for – the organization;
- c) publications, on- and off-line publishing: designs, produces and distributes any type of publication on paper or other supports, including digital, aimed at any stakeholder/influential segment;
- d) events and exhibitions: designs and ensures the best organization of any sort of event, convention, workshop, tradeshow, exhibition...organized or sponsored by the organization;
- e) etiquette: ensures the respect of rules and formal behavior, organizes visits, receives and accompanies VIPs in formal or informal occasions;
- f) account executive: the person closest to the internal customer, who listens to needs and interprets expectations, transferring these to his/her colleagues; it ensures the positive development of internal customer relations; keeps others up to date on results and indispensable changes when necessary.
- g) advocate: the person closest to the external influential or stakeholder, who actually engages in the dialogue and maintains the relationship.

As we have seen, every organization has specific needs and hence an absolute model, valid in any occasion, cannot exist.

What is important to underline is that each person operating in an organization's public relations department develops relationship initiatives aimed at influentials according to predetermined plans and pre-identified objectives.

10. listening and measurement

We now come to the final step of Gorel, the tenth, which closes and reopens the cycle: listening and results measurement and evaluation.

Do you remember that we had pre-tested key messages during the seventh step?

In fact, we had identified levels of the messages' context familiarity and source credibility.

On the basis of this information, we also decided communication objectives. In other words: if message x in the pre-test received familiarity of 5 and its source credibility of 4, it is realistic and feasible in y time and with z resources to set an objective of, say, message familiarity 7 and source credibility 6.

Hence, in the last step – which in fact reopens the cycle – I may verify if those communication objectives have been achieved by performing a second research on another representative sample of the universe of influentials.

The modalities of how this is done, again, may vary, but must be coherent with those adopted for the first research.

For example, it is likely that the very implementation of the first research may have had an impact on the sample of interviewed influentials.

Thus it is recommendable that the second sample be composed by 50% new influentials, in order to verify this possibility.

Furthermore, since public relations is highly correlated with external social, economic, and political dynamics it is also likely that the latter have in the meantime changed from the implementation of the first research.

This post test may also help in providing new reasons to revisit, adjust, and update the cycle (from envisioning to stakeholder groups listening, objective definitions, variables identification, influentials selection, key message wording, message pre-test, operating strategy definition, message transferring, listening and measurement, and so on).

Gorel is not a simple formula and certainly presents weaknesses and conceptual lacks.

Its sense, however, is in providing a “matrix”, a general scrap book methodology, with an approach inspired by other management disciplines, and to suggest realistic and feasible results measurement criteria: something which is very similar to the criteria otherwise adopted in assessing the results achieved by other management functions.

A case history

American Express Italy is a fully owned subsidiary of the American Express Company. Its product/service lines were -at the time of this case- payment instruments (credit cards and travelers checks) and travel services (travel agencies and related tourist services).

Under the Ceo's direction, the Italian management was asked to open a new service that would integrate the three categories stated above (credit cards, checks, and travel agencies) aimed at a specific market segment: business travel.

Briefly stated, the overall goal for the Italian management (as well as that of other countries) was to position Amex as undisputed leader in the business travel segment: a market of absolute relevance in which top travel agencies (American Express included) were already largely present.

The specific objective was to conquer a position of qualitative as well as quantitative leadership on the Italian market by integrating those three lines.

The relevant variables for Italy were:

- a) the growth of international economic relations of Italian companies (the internationalisation of the economy favors business travel);
- b) the exchange rate stability (which induces the use of credit cards)
- c) the degree of corporate management awareness of the effective amount of travel costs (this item had never been scrutinized nor centralized and thus was normally not controlled by internal budgeting procedures);
- d) the ability to offer a service containing effective and provable added value to companies (the concrete possibility of obtaining significant economic savings).

Once it was decided that Amex public relations activity could contribute to the achievement of the objective only if focused on the last two variables, the following step was that of deciding influentials.

On the level of corporate management awareness, the principal influential subjects were:

- a) management consulting firms, accounting executives and solo management consultants;
- b) trend-setting and opinion-leading corporate executives;
- c) executives of industrial associations;
- d) journalists and writers in media and literature normally read by corporate executives;
- e) authoritative business schools.

In the end, including institutional stakeholders as well (such as Banca d'Italia, the Ufficio Italiano Cambi, and the Associazione Bancaria Italiana) 800 different influential subjects were identified for the third variable.

The following step was focused on the wording of a couple of key messages:

- a) Italian companies spend some 14 thousand billion liras every year on business trips which represent some 20% of their total expenditures. These expenditures are not “managed” because the firms themselves are not aware and the trend is annually increasing by 20%.
- b) American Express, a worldwide firm, leader in this sector, has set up a management system that allows saving up to 20% of business travel costs.

The data contained in the first message resulted from an ad hoc study and the Amex management system represented in fact the actual saving resulting from a rationalization of these expenditures (centralization of flows and negotiation with suppliers), as well as an efficient accounting system which allowed the client's management to keep this entry under control.

Now the messages were pre-tested by interviews to a strong representative sample of the universe (200 out of 800). It was discovered that message a) was immediately granted familiarity 2 and source credibility 5, while message b) was granted familiarity 3 and source credibility 6.

Starting from a willingness of Amex dominant coalition to invest in a biannual public relations plan of 1 billion lira, Amex's public relations department set the following communication objective, again shared by top management, to be reached in those two years: message familiarity 7 and source credibility 8 on message a), and message familiarity 6 and source credibility 8 on message b).

A communication strategy and an operating plan were subsequently defined.

First, during an internal workshop with the company's dominant coalition (8 executives), it was decided to thematize the two key messages through all existing relationship systems in the firm.

With unstrained modalities, yet “governed” by a system of periodic reporting, these 8 managers transferred the two messages in the course of two years in the context of letters, documents, conversations, discussions, and planned as well as casual meetings.

This action was decisive for the plan's success, not so much in respect to message familiarity, but rather in respect to source credibility...

Furthermore, the research that had been commissioned to quantify the potential market was rewritten as a study and, in collaboration with Il Sole 24 Ore (Italy's Financial Times), was published as part of a book on business travel sold in bookstores.

Amex bought and distributed 1000 copies.

The whole story was presented in a press conference with excellent response from daily and periodic press.

After a few weeks, a conference "road show" was implemented in important areas where Italian firms who deal in international markets are mostly concentrated (Triveneto, Marche, Milan, Rome).

The conferences were sponsored in collaboration with the local industrial associations, and speakers included an Amex executive, a highly respected management consultant and the research institute's chief executive.

The following year, with a slightly greater expenditure, a second research was conducted and a second report on corporate travel spending was published, which was again greatly emphasized by newspapers.

Also, clients acquired during the first year accepted to give birth to a "Travel manager Association" (under Amex's coordination). This association introduced this new managerial profile.

At the end of the plan's second year, the association called for its first national conference...which was attended by about 30 members!

At the end of the second year of activity, a second survey was conducted on a sample representative of the universe of influential subjects (which in the meantime had grown to 2000).

The sample was composed of 200 people (100 were new, the remaining 100 had participated to the first survey).

The results for message a) were familiarity 8 and source credibility 9, while the results for message b) were familiarity 8 and credibility 10.

Moreover, the second research allowed Amex, which in the meantime had achieved its positioning as undisputed leader in Italy in respect to the specific targeted market segment, to reduce investments in public relations, and limit further dedicated expenditures to the development of the Travel Manager Association...

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Euprera ottobre 2002

From the Bled Manifesto to the Governance of Relationship Systems: notes for an integrated methodology of public relations