



# Teaching Public Relations

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## The Public Relations Case as a Teaching Tool

Gay Wakefield  
Associate Professor, Butler University

We preach that public relations practitioners should use case methodologies to guide professional decision-making. But do we really teach public relations cases in a way that prepares the future practitioner for such guided decision-making? A perusal of introductory and cases texts<sup>(1)</sup> reveals the term "case study" used as a generic reference to all cases in any form and for any purpose, covering everything from hypothetical situations to social anthropological research methodology -- confusing students and professors alike! We need to exchange confusion for 1) clear definitions, 2) distinct approaches, and 3) specific recommendations for dealing with various types of public relations cases.

### 1) Definitions

Webster has defined a "case" as "a set of circumstances or conditions...the object of investigation or consideration,"<sup>(2)</sup> while American Heritage has defined it as "an instance or exemplification of the existence or occurrence of something...a set of circumstances or state of affairs; the situation."<sup>(3)</sup> For our purposes then, it is reasonable to define a **public relations case** as *a set of circumstances, real or hypothetical, exemplifying the occurrence of one or more public relations theory or method.*

A "case history" is "a record of history, environment, and other relevant details (as of an individual) especially for use in analysis or illustration,"<sup>(4)</sup> so we can define **public relations case history** as *a record of the specific components of a public relations case which actually has been conducted.*

Since "analysis" has been defined as "separation of a whole into its component parts...an examination of a complex, its elements, and their relations,"<sup>(5)</sup> we can define **public relations case analysis** as *examination of a public relations case history, and evaluation of the case's components as they relate to public relations theories and models.*

"Problem" has been defined as "a question raised for inquiry, consideration, or solution,"<sup>(6)</sup> hence we can define a **public relations case problem** as *a question related to a public relations case and requiring inquiry, consideration, and/or solution based on public relations theories and models.*

The term "case study" commonly means "a detailed analysis of an individual or group, especially as an exemplary model of medical, psychological, or social phenomena,"<sup>(7)</sup> and we should adhere to that definition when applying the term to the social science of public relations. Therefore, a **public relations case study** can be defined as *a detailed demographic/psychographic analysis of an individual or group of importance to the organization or client.*

### 2) Approaches

Public relations cases can be used to promote critical thinking skills, to point up examples of strategies and tactics which have proven successful (or unsuccessful) in the past, to provide role-playing opportunities, and to allow problem-solving and decision-making experiences in which new ideas can be tried -- and mistakes can be made -- in an environment where failure leads to professional development rather than to unemployment.

A simple public relations case, real or hypothetical, often can be used more effectively than a lengthy explanation to crystallize or clarify a point. Case examples also can prove helpful in preparing students to handle situations such as client pitches.

Public relations case histories offer fertile ground for advanced public relations student to identify application of theories and methods studied in previous courses. Outside of the classroom, students can gain experience in a variety of secondary and primary research skills by compiling comprehensive case histories.

The case history becomes even more useful when it is part of a public relations case analysis, moving beyond a comprehensive presentation of the components of the case to an analysis of how those components compare to the "ideal" -- allowing students to practice the kinds of critical thinking and critical analysis skills which are invaluable to the public relations professional.

The mental gymnastics that can be engineered with case problems allow students to "try their own wings." Examples can be found in the annual Bateman and Campus Campaign Challenge competitions of PRSSA. Another effective case problem method is to give students the research section of a winning PRSA Silver Anvil Award entry, have them come up with solutions to the identified problem and situation, then present and discuss the winning planning, execution and evaluation sections of the entry-- usually resulting in a rise in students' confidence as they realize their own ideas are at least as good as those of award winning practitioners. Practical, realistic, multi-phase challenges-- like those presented in Simon's *Public Relations Management: A Casebook* and Carrell and Newsom's *Public Relations Writing Exercise Book* -- stimulate creativity and broaden perspectives as students realize that their chosen approaches may have unexpected consequences.

Since social/anthropological research methodologies are being employed more and more frequently in public relations, students should be familiarized with the public relations case study. While training in case study methods is best reserved for the research classroom, students in other public relations courses can identify when such methods might prove helpful -- such as target-public research, analyses of competition, profiles of hostile publics, campaign monitoring programs, etc.

### **3) Recommendations**

We "talk the talk" of being master communicators. It is time to "walk the walk" by applying appropriate definitions and approaches across the field, in education and in practice.

For instance, "Case Studies in Public Relations" is an inappropriate course title unless the case study *method* is the focus of the course. More appropriate titles, depending on the primary focus of the specific course, might be "Case Problems in Public Relations," "Public Relations Case Analysis," or simply "Public Relations Cases"-- a title which allows plenty of latitude for use of a variety of case approaches.

To establish a structure by which students and practitioners can realistically evaluate or compile case histories, it is helpful to employ the campaign process. But this may be more easily said than done since most campaign models tend to be very skeletal. This problem is compounded by the fact that most students don't have the experience needed to "read between the lines." Employing a more comprehensive

campaign model, such as the "Strategic Campaign Design Cycle," offers students and practitioners a step-by-step framework for evaluation or compiling a case history.

For public relations case analyses, students and practitioners should be guided beyond the framework of the campaign model to thorough analysis and logical, theory-based explanations and rationales. Critical-thinking skills and critical-analysis skills are not innate; they are learned. We can provide guidance in the form of questions, such as those on the "Report Format for Case Analyses," which help individuals to develop such skills.

While full courses focusing upon public relations cases may not be feasible for all programs, public relations cases -- in any and all approaches -- can be incorporated into various other public relations courses. From case examples in introductory courses, to writing/design case problems in techniques courses, to case studies in research courses, to comprehensive case analyses in campaigns courses, to multi-phase case problems in management courses, cases help to enliven the public relations classroom and to crystallize theory in the minds of students.

One caution, however, is that students need the appropriate background and experience to handle a particular case approach. For instance, most introductory public relations students are not ready to do case analyses. Specific case approaches should be chosen based upon the specific course objectives.

Hierarchically, it makes educational sense to use public relations cases as *examples* of specific theories and methods which support "knowledge" objectives, public relations case histories in which participants *identify and explain* theories and methods to support "comprehension" objectives, public relations case analyses in which participants *evaluate* application of theories and methods to support "application and analysis" objectives. and public relations case problems and case studies in which participants *select and/or develop* specific combinations of theories and methods to support "synthesis and evaluation" objectives.

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## STRATEGIC CAMPAIGN DESIGN CYCLE

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### RESEARCH

#### Situation Analysis

Organization's . . .  
Structure  
History  
Mission Statement  
Products/Services  
Current publics (by audience & market)  
Past public relations experience

#### Pre-Campaign Research

Public relations audits  
Comparisons to competition  
Issue identification  
Organizational goals



### PLANNING

#### Strategy

Strategic objectives  
Campaign theme statement  
Total budget allowed for campaign  
Campaign limitations (i.e., time, resources, budget, etc.)

#### Tactics

Tactical objectives  
Media & event selection  
Allocation of budget & resources  
Creative approaches  
Logistics  
Contingency plans

Priority ranking of public relations issues, challenges & opportunities  
 Management counseling  
 Determination of specific campaign goal  
 Profiles of target publics (by audiences & market)  
 Identification of available resources




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### **EVALUATION (Campaign Audit)**

Monitoring summary  
 Progress toward objectives  
 Publics' responses  
 Management's responses  
 Campaign's value related to organizational mission  
 Competitors' responses  
 Cost/benefit analysis  
 Recommendations for the future




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### **IMPLEMENTATION**

Approvals (plan, legal, etc.)  
 Resource commitments (personnel, budget, facilities, supplies, purveyors, media/time space, etc.)  
 Production of campaign materials  
 Management of personnel/media/events/  
 Budget management  
 Campaign monitoring and adjustment




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### **Notes**

1. Otis W. Baskin and Craig E. Aronoff, *Public Relations : The Profession and the Practice*, third edition (Dubuque, IA: Wm. C. Brown Publishers, 1992); Scott M. Cutlip, Allen H. Center and Glen M. Broom, *Effective Public Relations* sixth edition (Englewood Cliffs, NJ: Prentice Hall, Inc., 1985); Jerry A. Hendrix, *Public Relations Cases*, second edition (Belmont, CA: Wadsworth Publishing Company, 1992); Doug Newsom and Alan Scott, *This is PR: The Realities of Public Relations*, fourth edition (Belmont, CA: Wadsworth Publishing Company, 1989); Raymond Simon, *Public Relations Management: A Casebook* (Columbus, OH: Publishing Horizons, Inc., 1986).
2. *Webster's Seventh New Collegiate Dictionary* (Springfield, MA: G. & C. Merriam Co., 1967).
3. *The American Heritage Dictionary* (Boston: Houghton Mifflin Company, 1978).
4. *Ibid.*
5. *Webster's . . . , Op. cit.*

6. *Ibid.*

7. *The American Heritage Dictionary, Op. cit.*

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## Report Format for Case Analyses

### I. Case History

#### A) Situation Analysis

- 1) Background on the organization, including organizational structure, history, mission, products/services, significant public relations experiences, any other available information.
- 2) Nature of the problems involved in the case, including their backgrounds and causes

#### B) Pre-Campaign Research

- 1) Review any secondary and primary research completed prior to the implementation phase and findings resulting from that research.
- 2) Identify the campaign goal (explicit and/or implicit), and discuss how it was developed (by whom, based on what research, in response to what stimuli, etc.)

#### C) Planning

- 1) Strategy -- Identify the campaign theme statement (explicit and/or implicit), stated campaign objectives, time restraints and any other stated restrictions on the campaign.
- 2) Tactics -- Review the tactics chosen for the campaign and the rationales used to support those choices (i.e., media and event, resource allocations, creative approaches, logistics, contingency plans, etc.)

#### D) Implementation

- 1) Identify how the plan was approved.
- 2) Review the campaign coordination and materials employed.
- 3) Present any campaign monitoring and adjustment employed.

#### E) Evaluation

- 1) Review the evaluation methods employed for the campaign.
- 2) Present any conclusions stated as a result of such evaluation.

### II. Case Evaluation and Recommendations

A) Analyze the positive and negative aspects of the campaign based on the four-step model, making recommendations for improvement as needed. Remember that explanations and rationales, based on established theories and methodologies, are **extremely** important.

## 1) Research Step

### a) Initial Research

i) Was the situation analysis information employed in the campaign satisfactory? (Explain) If not, what additional information was needed? (Rationalize) (Consider organizational background, organizational structure, history, mission, products/services, significant public relations experiences, the problem, any other relevant information.)

### b) Pre-Campaign Research

i) Was the primary and secondary research employed adequately for this campaign? (Explain) Was it completed properly? (Explain) Were the findings applied correctly? (Explain) What research was needed but not completed, and why was it needed? Were there good reasons that it was not completed? How would you conduct the pre-campaign research phase in order to improve it? (Rationalize) (Consider public relations audits, competition analyses, management input, organizational goals and objectives, issues identification, demographic/psychographic profiles of prioritized target publics, available resources, etc.)

ii) Was the stated campaign goal (purpose) grounded in pre-campaign research, or does it seem unrelated to existing research? (Explain) What alternate campaign goal would be appropriate, based on existing research? (Rationalize)

## 2) Planning Step

### a) Strategy

i) Was there a campaign theme statement? If so, was it well-stated? (Explain) If not, what campaign theme statement would you use? (Rationalize)

ii) Were there stated strategic objectives? If so, were they designed well? (Explain) If not, what strategic objectives would you use? (Rationalize)

iii) Were campaign limitations (including time, budget, resources, etc.) considered realistically? (Explain)

### b) Tactics

i) Were tactical objectives stated? If so, were they appropriate and designed well? (Explain) If not, what tactical objectives would you

use? (Rationalize)

ii) Were media and event choices made systematically? (Explain) If not, what system would you recommend? (Rationalize) Were media and event selections appropriate to the tactical objectives? (Explain) If not, how would you improve those selections? (Rationalize)

iii) Were the budget and resources allocated effectively? (Explain) If not, how would you allocate them? (Rationalize)

iv) Were creative approaches addressed specifically? If so, were they appropriate for the target audience and for the strategic and tactical objectives? (Explain) If not, what creative approaches would you employ? (Rationalize)

v) Were logistical plans designed appropriately? (Explain) If not, how would you improve upon them? (Rationalize) Were contingency plans included? If so, were they appropriate? (Explain) If not, what contingency plans would you employ? (Rationalize)

### 3) Implementation Step

a) Were all appropriate approvals received prior to implementation of the campaign? (Explain) If not, what approvals would you recommend? (Rationalize) (Consider organizational approvals, agency approvals if appropriate, legal approvals, etc.)

b) Were all necessary resources committed prior to implementation of the campaign? (Explain) If not, for what resources would you gain commitment? (Rationalize) (Consider personnel, budget, facilities, supplies, suppliers, media time/space, talent, etc.)

c) Were campaign resources managed effectively? (Explain) If not, how would you manage them? (Rationalize) (Consider personnel, budget, facilities, supplies, suppliers, media time/space, talent, etc.)

d) Were campaign materials and events produced in accordance with stipulated creative approaches? (Explain) Were they appropriate? (Explain) If not, how would you produce them? (Rationalize)

e) Was the campaign monitored adequately? (Explain) If not, how would you monitor the campaign? (Rationalize) Were needed adjustments made in the campaign when monitoring indicated such need? (Explain) If not, what adjustments would you make? (Rationalize)

### 4) Evaluation Step

a) Were results of the campaign monitoring and adjustments summarized effectively? (Explain) If not, what summary would you offer? (Rationalize)

b) Was each strategic and tactical objective adequately evaluated to determine specifically how much progress was made toward each? (Explain) If not, what

evaluation of objectives would you offer? (Rationalize)

c) Were responses from the organization's key publics adequately considered in the evaluation? (Explain) If not, from which publics would you seek feedback, and how would you evaluate that feedback? (Rationalize)

d) Were responses from the organization's management adequately considered in the evaluation? (Explain) If not, what feedback would you seek, and how would you evaluate that feedback? (Rationalize)

e) Was the campaign's value evaluated relative to the organization's mission? (Explain) If not, what evaluation would you offer? (Rationalize)

f) Were reactions from the organization's competitors evaluated? (Explain) If not, what evaluation would you offer? (Rationalize)

g) Was an adequate cost/benefit analysis conducted? (Explain) If not, what analysis would you offer? (Rationalize)

h) Were recommendations offered for the future based on the campaign audit? (Explain) If not, what recommendations would you offer? (Rationalize)

### III Case Summary

A) Paragraph of no more than 50 words summarizing the Case History and the Case Analysis and Recommendations sections.

B) Paragraph of no more than 50 words summarizing what lessons you have learned from this case study exercise.

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