



Onclusive

The Complete Guide to Building an Impactful Relationship with Your PR Agency





Introduction

A successful communications strategy is the driving force behind building trust among all of your stakeholders, enhancing your corporate reputation and establishing your company as a leader in your industry. A strong PR agency that aligns with and understands your business can be an invaluable strategic adviser and resource for your brand in this endeavor.

However, not all brand and PR agency relationships are created equal. We have all worked with external consultancies that greatly contributed to an organization, and others that didn't really move the needle. For over a decade, Onclusive has been involved in hundreds of collaborations between our customers and their PR agencies, and we're delighted to share the experiences and best practices we collected over the years in this whitepaper.

Why work with a PR agency, and is it right for your business?

A PR agency is a communications consultancy that serves as an external resource, and ideally, an extension of your internal communications function. An agency can help your business by bringing in useful connections, leveraging best practices, generating fresh ideas and capturing the ‘bigger picture’—an objective perspective of your brand and your industry, which can be challenging for an in-house team. The best PR agencies, like any strong consultancies, not only provide recommendations but also challenge the status quo.

That said, not every organization should hire a PR agency. If your company is a small startup with a limited budget, you may first want to hire a freelance PR consultant or an internal PR specialist, who can help you build awareness and potentially source a PR agency later on.

Similarly, if your company has a very specific communications need, such as deep product expertise or a niched B2B network in your sector, it may be optimal for you to build an experienced and well-connected in-house team that is integrated with the day-to-day operations of your business.

Alternatively, hiring a PR agency may be a smart move when you have clear business objectives that call for this type of investment, as well as the resources to support it. A strong agency will help you shape a communications plan that supports your corporate objectives.

CARL GERMANN

Senior Marketing Manager, Content & PR, Monster

Monster hired a new PR agency in March 2020, right before the COVID-19 pandemic hit. We got to become best friends as we figured out a strategy for the “new normal” together. In partnership, we developed a proactive plan to differentiate ourselves that focused on our core strengths: storytelling, data, and thought leadership, while leveraging the agency’s skills with press releases, media training, and media relations. This relationship was really key for us to be able to pivot smoothly amidst many sweeping changes in our industry, such as the skyrocketing unemployment rate.

Other reasons to work with a PR agency could be the need for extra resources, particular areas of expertise that do not exist in-house, or access to a larger network of quality relationships. When your company’s own networks and channels reach their capacity for customer acquisition, finding talent and differentiating your brand in a noisy marketplace, an agency with the right connections and strategic expertise in your industry could be the answer.

How a PR agency can contribute to your communications strategy

According to the Public Relations Society of America (PRSA), “Public relations is a strategic communication process that builds mutually beneficial relationships between organizations and their publics.” At its core, public relations is about influencing, engaging and building a relationship with key stakeholders across numerous platforms in order to shape and frame the public perception of an organization—in other words, the main goal of PR is to boost the awareness and reputation of your brand.

A strong PR agency is not just an extra set of hands, but, ultimately, a strategic partner who can help your internal communications team build long-term relationships with your key audiences. They are good listeners in your market and know which conversation starters will get traction. They will also masterfully push back on ideas that they think may fall flat without offending or alienating your team, and therefore, they will help you catalyze innovation and growth.

ORIANA BRANON

Director of Corporate Communications, Bill.com

I rely on my agencies as thought partners to see the opportunities and challenges in the market, to view our company and our communications strategy from the outside-in ('Are we drinking our own Kool-aid? Will this really work? Is there another, better way to approach this?'), and to push us outside our comfort zone to try new things. I view my agencies not just as my much-needed hands and feet on the ground, but also as creative, out-of-the-box thinkers that challenge the status quo.

To achieve the primary goal of boosting your brand awareness and reputation, your PR agency partner will use a mix of communications strategies and tactics to help you better understand your audiences, contribute to and execute your strategic communications plan, and provide counsel around policy decisions, courses of action and messaging.

A typical PR agency toolkit can include some or all of the following:



Strategic counsel



Reputation management



Crisis management



Media relations, including outreach and pitching



Analyst relations (e.g. for technology companies)



Social media management



Storytelling, content marketing and copywriting



Policy decisions



Key messages



Press release writing and distribution



Speech writing



PR event planning



Market research



Media training



The first step is to gain clarity on what your company most needs from a PR consultancy right now—is it all of the above, or specific expertise in just a few of these areas?

Review your corporate objectives and communications goals, make a list of the key priorities and create a budget before going to the next step of selecting a PR agency to work with.

BRYAN PEDERSEN

Chief Innovation Officer, MSLGROUP

When selecting a PR agency, first ask yourself: why do you want to hire an agency? What do you want them to bring to the table? One of the most important things a PR agency should offer is a broad perspective. PR has changed so dramatically in the last few years, and there are so many technology solutions out there, for example, Onclusive, which is one of my favorite companies to work with. There are now technology solutions for every single PR problem, and an agency should understand all of them, have an opinion, present real-life use cases including the good and the bad about each one, and recommend the ones that would work best for your business.

Selecting the right PR agency for your business

To select a PR agency that aligns well with your business, you must first have clarity on the particular audience that you will be reaching through your PR efforts. The answer is never “everybody.” Knowing who your audience is will tell you what type of PR agency to look for. And sometimes, you will need more than one PR consultancy partner to address multiple audiences.

Once you’re clear on your target audiences and have your goals and priorities in mind, you can start thinking about and researching PR firms that can help you connect with those audiences and meet those objectives. You’ll need to do some homework to ensure that a PR agency you choose understands your business and where you’re aiming to go.

ORIANA BRANON

Director of Corporate Communications, Bill.com

I need an agency that can not only step up to where we are, but also push us forward to where we want to be, bringing a different perspective to our culture and brand. A proactive team that is making moves in-between company announcements, using this gap as an opportunity to create news versus waiting for the news to come to us. In addition to that, I work with two different PR agencies to address the different audiences we have with integrated storytelling—one traditionally focused on business and technology outlets, and another one uniquely serving our audience of accountants.

Here is our recommendation on what to look for in a PR agency:

- ✔ **Significant focus and expertise in your industry** (e.g. technology, CPG, financial services, etc.)—make sure they understand your sector in depth
- ✔ **Current and past brand clients that are similar or related to your business**
- ✔ **Ability to get specific types of press, and key media contacts you're looking for** (e.g. in certain publications where you want to be featured)
- ✔ **Strong cultural fit**—can they find and “get” your voice, and are they leading the conversation?
- ✔ **Strong personality fit**—get to know the account team you'll work with and make sure you like them and they like you, because that's where the magic happens
- ✔ **Size and budget fit**—ensure they are the right size for your organization, and their pricing aligns with your budget

This checklist will help you focus as you research different PR firms on their websites, social media and independent review sites, and ultimately create a shortlist of agencies you'd want to meet with.

CARL GERMANN

Senior Marketing Manager, Content & PR. Monster

During our recent change in leadership at Monster, we realized that our PR agency wasn't in alignment with where we saw the brand and where we wanted it to go, and it was time to find a better personality and cultural fit. Our long-standing creative agency partner, who really understands our business, brand and voice, connected us with their PR division. Thanks to that connection between creative and publicity, we've developed a cohesive plan across the larger marketing, brand and product teams, and working with an agency that fully understands our brand and mission has made a big difference.

Before you contact PR agencies you want to meet with, create a list of specific criteria that you will use to evaluate them and write down a list of questions that will help you evaluate your finalists. Asking different agencies the same set of questions will get you the structured set of data that you need to make an informed decision. In addition to evaluating all the criteria we outlined in the above checklist, such as expertise in your industry and a strong cultural fit, we recommend that you also ask the following questions:

- How do you measure success?
- How would your PR strategy align with our business goals?
- How can your agency grow with us?

At the end of the day, your assessment should always include the agency's ability to align with your business objectives, communications goals and success metrics.

Setting expectations around the PR agency's role and working together

After you've chosen your PR agency, setting clear expectations about the level of support you need from them as your strategic partner, as well as what they need from you in order to deliver will go a long way toward setting everyone up for success.

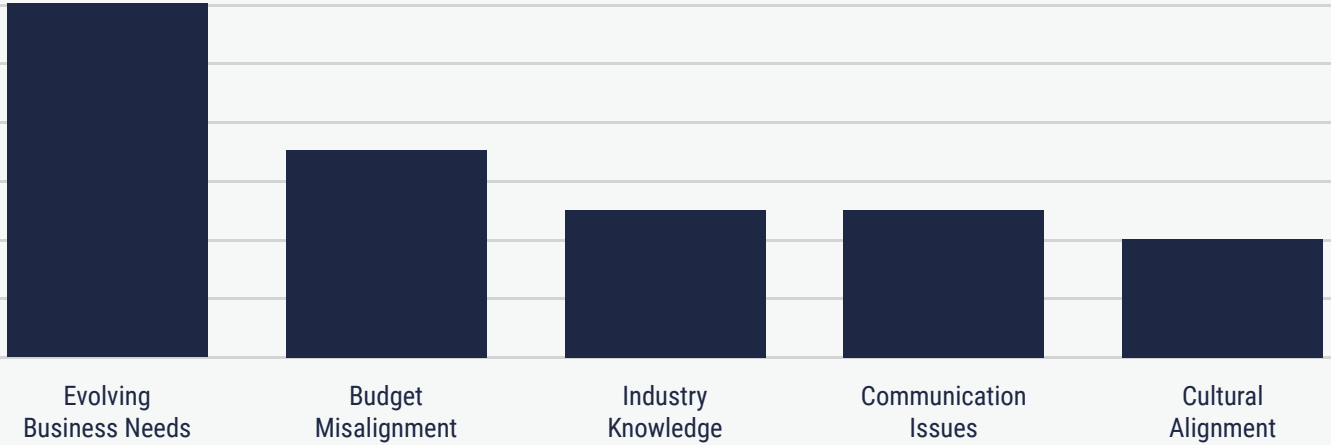
We've seen the lack of clarity around this as one of the major breakdowns in the brand and PR agency relationships. Here are some common pain points that can be addressed by setting the right expectations and sharing the right information from the start:

- The lack of clarity around the agency's role, on both the brand and agency sides
- On the brand side, clients' misunderstanding of how agency teams are spending their time per their retainer budgets, and how many people are involved in each deliverable
- On the agency side, not having or asking for enough information from their brand clients about the full scope of their client's business, marketing goals and communications strategies to be able to be a true strategic partner and advisor
- And as a result, high agency turnover and having to start the process all over again

In the beginning of your working relationship with your new agency, you'll want to spend ample time clarifying your expectations, educating them on your brand and your business, and discussing objectives, deliverables, timelines, processes and success metrics. For example, one of the biggest opportunities for success is to distinguish between "outputs" like the volume of media coverage and "outcomes" such as measurable website traffic increases.

Maintaining an ongoing productive relationship with your PR agency is another important topic to address. Here are the poll results from our recent webinar that illustrate the common challenges in a brand / agency relationship:

What's been your biggest challenge when working in a PR agency / brand relationship?



Not surprisingly, the #1 challenge is “evolving business needs.” In today’s dynamic environment of constant change, the relationship between your brand and your PR agency should also be constantly evolving. This requires ongoing communication and re-evaluation of strategies and tactics.

For the best working relationship with your PR agency, we recommend setting a mutually agreed upon schedule of regular business reviews and communications strategy planning sessions. Not only will it ensure consistent alignment with your goals, processes and success metrics, but it can also help you overcome the reactive nature of PR.

ORIANA BRANON
Director of Corporate Communications, Bill.com

It's important to note and recognize that priorities change over time. We are a very different company today than we were, say a year or even two years ago. We are on a journey in shaping our narrative post-IPO, and as such, the priorities that we had when we first secured an agency years ago are different from our needs today. We address these different priorities with our PR agency through constant communication and recalibration, rather than waiting until the end of the year to have a review with them.

Onboarding your PR agency, and establishing the optimal scope and budget

Don't underestimate the power of an onboarding process for any new strategic partner you bring in to support you, including your PR agency. The way you handle onboarding will in many ways make or break a successful collaboration with an agency.

Onclusive has collected some of the best practices for a PR agency onboarding process, which have helped our customers make the most of their agency relationships.

1. First, thoroughly educate the agency on your business, including:

- Your brand and what you stand for
- Business objectives, marketing and communications goals, and PR objectives—it is important to share the full picture
- Current strategy and tactics to meet those goals
- Business, marketing and communications KPIs (key performance indicators)
- Strategic decision-making process (ongoing, monthly, quarterly, etc.)
- Reporting structure (e.g. who and how often)

2. Then, co-create your ideal working relationship by having conversations about:

- Roles and responsibilities of the internal communications team versus PR agency (e.g. media relations, crisis management, social media, etc.)
- Scope of the agency retainer
- Key business, marketing and PR success metrics
- Reporting needs and expectations (how, what, when)
- Preferred communication methods and ongoing meeting cadence (check-ins, business reviews, planning sessions)
- Main agency and client points of contact

One of the most important topics you'll want to further discuss during the PR agency onboarding process is the scope of the agency retainer and the budget needed to execute on it. The typical PR agency toolkit can be quite comprehensive, depending on the specific agency's areas of focus. To hone in on the scope and budget that's optimal for your brand, review your communications goals, priorities and needs, and be ready to discuss where the agency can most help you move the needle given their particular expertise and resources.

The onboarding process is a great opportunity to clarify your expectations about the level of support you need from your PR agency and discuss with your account team what they need from you to deliver on those expectations, including the budget.



Setting goals aligned with communications objectives

To ensure that the goals you establish with your PR agency contribute to your organizational success, start with reviewing your overall business, marketing and communications objectives. Using them as your guiding posts will help align your PR strategy with your key business outcomes, such as increased awareness, or increased website traffic.

The next step is analyzing your communications measurement data to set realistic PR benchmarks based on past performance, as well as current resources, budget and talent. **Measuring the real business impact of your communications activity** is important not only for goal-setting, but also for being properly supported as a function by your organization.

Once you have a clear idea of where you've been, where you're going, and what resources you have to get there, you can drive the goal-setting process in collaboration with your PR agency. Just like in any other aspect of your business, Onclusive recommends setting **SMART goals (Specific, Measurable, Achievable, Relevant and Timely)**.

To learn more about the process of developing SMART communications goals aligned with your company's business objectives, download and read **The Executive's Guide to Building and Leading an Impactful Communications Team**.

Setting the right goals is one of the most important things you can do for yourself, your team, your PR agency and your organization. To help you avoid common goal-setting mistakes, here are a few best practices we've seen our customers implement over the last decade:

- **Look beyond media relations and coverage category goals** to also include goals that roll up to the overall marketing and business objectives.
- **Consider both absolute and relative goals.** While some outcomes are important in and of themselves, others are best put in the context of what competitors or the industry are doing.
- **Give PR enough time to build momentum.** Similarly to many other aspects of life and business, when you're just getting started it takes time to generate meaningful results.
- **Don't forget the longtail effects of good content.** Unlike advertisements, earned media continues to get readership that could result in new customers weeks, months and sometimes even years after the original publication date.
- **Amplify the content that you do get.** Use social media marketing and other promotional channels to get more eyeballs on your best earned media content.

Finally, as you're setting your PR goals and success metrics, tie them to dollars and / or corporate reputation whenever possible. These are the tangible outcomes that will resonate with your C-suite, while keeping your PR agency accountable to deliver results that will move the needle for your brand.

BRYAN PEDERSEN

Chief Innovation Officer, MSLGROUP

We are at such an incredible inflection point right now. We are starting to answer the questions about PR measurement and scaling the best PR strategies. There is such a huge amount of data available, and the best agencies and best clients are thinking about how to measure it with the same level of sophistication that's been applied in digital media for well over a decade. If we can measure what happens when people read articles and take action, we can show the value of investing in compelling content. The power that an agency can bring is tying all these things together, creating this data layer, offering solutions that are backed by data, and giving clients a roadmap of how to start evolving their business based on that.

Measuring and reporting on metrics that matter

Now that you've set your PR agency goals, how will you measure success? Onclusive has developed a way to reliably measure the business impact of communications and PR across the entire customer journey, helping determine the quality, resonance, influence, and bottom line impact of every article—metrics that matter to your executive team.

Here are the key metrics our customers commonly use to track and showcase communications and PR success in their organizations:

- **Volume of Coverage:** overall, target media, specific campaigns
- **Share of Voice:** the quantity of your coverage vs. your competitors
- **Power of Voice™:** the quantity + quality of your coverage vs. your competitors, including content relevance, publication authority, social media amplification and sentiment
- **Social Amplification:** social engagement with your content
- **Message Resonance:** spokespersons, products, value propositions, events
- **PR Attribution™:** business outcomes influenced by your media coverage, such as website traffic, demo requests, sign-ups, sales and revenue

ORIANA BRANON

Director of Corporate Communications, Bill.com

Onclusive has connected with our marketing analytics team to build a pathway inside Bill.com so that we can accurately track the traffic from our earned media to our website and through the funnel, resulting in new business that has been closed. We then report back to the C-suite how our campaign efforts, message pull-through and other communications initiatives have contributed to Bill.com's potential power.

One of the common challenges we see in communications and PR measurement is that different teams and regional business units use their own, unique metrics and monitoring systems. It's impossible to see the big picture if KPIs don't align across the different parts of the business. Onclusive recommends implementing a unified and consistent measurement system that transcends agencies and applies across not just internal teams and regions, but also all external consultancies working for the same brand.

When it comes to reporting, the best practice is to establish a cadence that works well for your team and your C-suite. Will there be weekly check-ins? Ongoing reports on a monthly and quarterly basis? Most of Onclusive's customers do all of the above and roll the reports from their PR agencies into the monthly communications dashboard they share with their executive teams.

Finally, we want to touch on creating structures for an ongoing review and planning cycle. Scheduling quarterly business reviews (QBRs) and ongoing strategic planning sessions has helped many of our customers be proactive vs. reactive, and use both their internal resources and external experts to develop and refine their communications strategy.

Using technology for PR measurement, reporting and strategic planning

AI-powered technology tools like Onclusive can help unify your communications and PR measurement, data and reporting across teams, regions and external partners.

The Onclusive platforms enable you to effectively monitor global media coverage for your brand and competitors and demonstrate which content is influencing website traffic, conversions, and revenue. Our Customer Success team is ready to set up both your team and your PR agency and help you produce unified weekly, monthly and quarterly reports with a click of a button.

We provide an Enterprise solution for established organizations, a Pro platform for growing organizations, and a Data-as-a-Service offering for custom applications to enable using Onclusive's data internally. [Request a demo](#) or [contact us](#) today to discuss which option may be right for your business.

Key Takeaways

- A strong PR agency that aligns with and understands your business can be an invaluable strategic adviser and resource for your brand.
- To select the right PR agency, get clear on your needs and priorities, look for a good fit with your culture and brand, and ask how they can grow with you.
- From the get-go, set clear expectations about the level of support you need from your PR agency, as well as what they need from you in order to deliver on your goals.
- Like all relationships, your relationship with your PR agency is always evolving and requires ongoing communication and recalibration. Keep the conversations going!

ORIANA BRANON

Director of Corporate Communications, Bill.com

Data has traditionally plagued PR professionals and made us second fiddle to marketing... but thanks to the tool set we have with Onclusive, we can look at our owned and earned channels and demonstrate tangible traffic from those channels coming back to the Bill.com website, going through the funnel, and actually turning into customers. Now, instead of throwing out ideas and seeing what sticks, we can build our data-driven business case for creating campaigns and testing performance. This is something we never had before Onclusive.

Onclusive

Onclusive is the data science company for communications. The inventors of PR Attribution™ and Power of Voice™, our inclusive data and conclusive insights reveal which marketing communications strategies drive business outcomes—through to revenue. The Onclusive media monitoring platforms are built upon a proprietary global news crawler which analyzes millions of earned, owned, and newswire content daily in over 100 languages, organizing each based on dozens of dimensions.

For more information, visit onclusive.com and follow us on Twitter, LinkedIn, and Facebook.

To learn how you can grow your agency with Onclusive, [click here](#).

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