The Role of Strategic Communications in Organizational Strategy

Development and Implementation

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Abstract

In a time when the zeitgeist is marked with uncertainty, discontentment and rapid change, the role of the communicator has been elevated to work side by side with CEOs doing work that is inextricably linked. This poses the question: how and to what extent should the strategic communications function contribute to organizational strategy and implementation? This paper explores the elements of strategic communication that advance an organization's success, the expectations that executives have of strategic communicators, and models, frameworks and tools that communicators can leverage for strategic decision making. Research was conducted via a content analysis of strategic plans and interviews with both executive leaders and communications leaders. The results demonstrated that the extent to which strategic communications can support strategy development is high, a sentiment that executive leaders and communications leaders are aligned on. The path to the executive table includes stakeholder relationship management, environmental scanning, risk analysis and management, and being able to add value with skills and knowledge.

Keywords: Strategy, strategic management, strategic planning, strategic communication management, symmetrical communications, trust, reputation, stakeholder relationships, environmental scanning, boundary spanning, ethical decision making.

COMMUNICATION'S ROLE IN ORGANIZATIONAL STRATEGY

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Introduction

The world has changed, and with it the business landscape. Shifts in global demographics, world powers and digital communications have empowered stakeholders to hold organizations accountable, be transparent and have social purpose (Hynes et al, 2018). As a result, the context in which organizations operate has changed. The world is more complex, dynamic, ambiguous, uncertain and volatile than ever before. Agreement on basic facts has become difficult, due to deep fake technology, alternative truth, and mis- and disinformation contesting truth and objectivity. Digital tools and social media continue to evolve and new technologies, such as artificial intelligence (AI), continue to impact our daily lives. The COVID-19 pandemic (2020 – 2023) catalyzed profound changes in organizations, forcing them to evolve rapidly to become more agile and lean in the face of increased competition from AI driven platform businesses. More than ever, societal issues such as social justice and environmental sustainability are at the forefront of daily thoughts (Gregory & Willis, 2023).

There has not been a time in recent generations when executives across diverse regions and industries have seen such change and transformation at today's rate. CEOs are defining the character and identity of organizations by leveraging strategic communications, while at the same time, communicators are engaging stakeholders, authentically building reputation and earning trust (Page, 2019).

The role of communications professionals has been elevated to become more strategic, impactful and important, and positioned to strengthen organizations, rather than simply executing tactics like speechwriting and organizing events (Argenti et al, 2018). Furthermore, the role has evolved to include strategically planning the organization's positioning; influencing external forces like brand perceptions, policy and reputation; and influencing internal forces like culture and strategy. It has been suggested that there is a need for communication practitioners to directly support corporate strategy implementation (Argenti et al., 2005). Yet, there is a lack of academic literature emphasizing strategic communication and its link to organizational strategy (Argenti et al., 2005), as well as a lack of consideration of the role of communications in the strategic decision-making process (Steyn, 2003). Research and discussion about this critical function and topic is now nearly 20 years old with no new evidence to impact those holding these positions.

Literature review

Strategy

According to Porter (1996),

> Strategy is the creation of a unique and valuable position, involving a different set of activities. If there were only one ideal position, there would be no need for strategy. Companies would face a simple imperative - win the race to discover and preempt it. The essence of strategic positioning is to choose activities that are different from rivals'. If the same set of

activities were best to produce all varieties, meet all needs, and access all

customers, companies could easily shift among them and operational

effectiveness would determine performance (p. 61).

The essence of strategy is that it is a competitive advantage based on the specific

activities a company performs or chooses not to perform –trade-offs are critical to

strategy. The strategic agenda should define an organization's unique position and

continually search for ways to reinforce and extend the company's position. The

focus of strategy is across the whole enterprise, as opposed to individual

departments or functions, and requires the organization does many things well and

integrates them, creating fit across the organization's activities. Strategy demands

discipline and continuity, while avoiding distraction and compromise (Porter,

1996).

While operational effectiveness is necessary for superior performance, it

can be easily replicated and does create differentiation between competitors.

Thus, it is not strategy. When a company's activities do not fit with each other,

there is no distinctive strategy and operational effectiveness determines

performance (Porter, 1996)

Strategy formulation can be either deliberate or emergent. Deliberate

strategy is intentional and realized, as identified through a strategy development

process. Emergent strategy refers to the realized strategy developing through

patterns or consistencies that develop independently or in the absence of

intentions. Deliberate strategy tends to be dictated from the top down, while

emergent strategy tends to originate throughout the organization. Deliberate and

emergent strategy represent two poles along a continuum, and an organization's strategy will fall somewhere along the continuum (Mintzberg & Waters, 1985).

As a result of today's context in which business operates, institutional action has been stimulated and organizations often prioritize environmental, social and governance principles as priorities (Gregory & Willis, 2023). In today's complex and increasingly unpredictable world, the factors to consider in strategic choices have increased. Organizations need to be able to quickly adapt as new insight and information becomes available and so strategic-decision making must be an ongoing process (Mankins, 2022).

Role of Executive Leaders

Executives are accountable for the results and performance of the company according to both its own goals and those of diverse and often competing external stakeholders. This can be summarized by four main tasks: Defining the external environment, determining the business the organization is in or not in, balancing present and future, and shaping values and standards (Lafley, 2009). The role is characterized by uncertainty and making big decisions about people, resources and strategy (Nadler, 2005).

The role of leaders is to make and enforce clear strategic choices, through developing or reestablishing a clear strategy (Porter, 1996). They provide discipline to avoid distraction, say no when activities aren't a strategic fit, and consider how environmental change, such as changes in the industry and customer needs, will impact the strategy. Furthermore, their roles involves teaching

managers about strategy, helping them to have the perspective and confidence to maintain one. According to Porter,

> The challenge of developing or reestablishing a clear strategy is often primarily an organizational one and depends on leadership. With so many forces at work against making choices and tradeoffs in organizations, a clear intellectual framework to guide strategy is a necessary counterweight. Moreover, strong leaders willing to make choices are essential (1996, p. 77).

> There are many unique considerations that make this role unique, such as receiving information from people with agendas, people being guarded and avoiding tough conversations in their presence, personally facing criticism of the business, the vulnerability that accompanies the one making tough calls, and the extreme loneliness of having no peers at that level. This increases the importance of trusted advisors such as governance experts, business strategists, lawyers and public relations professionals (Nadler, 2005).

> Organizational leaders make key decisions for the organization, are expected to have a strategic mindset, and to take a high-level view across the organization with a "strong sense of accountability to the world outside this strategic understanding (Gregory & Willis, 2023, p. 48). This mindset lends to the opportunity to develop an ongoing working relationship with a communications leader, as both view the organization holistically. Often, both consider the importance of a license to operate and earning consent and support with key stakeholders. These considerations include the organization's place in the world,

analyzing stakeholders and analyzing the organization's goals through the stakeholder lens. This analysis contributes to refining purpose, direction and strategy (Gregory & Willis, 2023).

Another role of the leader is to ensure the strategy can be fulfilled through capabilities and assets – both intangible and tangible. Tangible assets include things like cash, inventory, people and technology. It is the intangible assets where a communications leader adds value, considering assets like goodwill, trust and reputation (Gregory & Willis, 2023).

Leaders must be both effective and ethical. An effective leader produces business results. An ethical leader uses ethical methods of leadership to gain support from employees, while also being productive, efficient and profitable. A leader who fails at the latter is neither ethical or effective (DesJardins et al., 2021). These leaders are perceived as caring about job performance that is consistent with ethical values and principles. Ethical leaders should demonstrate ethical action and being people-oriented in a visible and socially understood manner. This includes receptivity, listening, openness, integrity, honesty, trustworthiness and broad ethical awareness, showing concern for multiple stakeholders, and using an ethical decision-making process (DesJardins et al., 2021).

This significance of environmental, societal and governance issues has long been understood, but has never been more prevalent than in today's post-pandemic world, with a zeitgeist shaped by major economic disturbances and many countries and organizations becoming aware of the issues associated with

systemic racism. Performance is no longer measured by the company's own goals, but also by the expectations of different stakeholder groups. Executive leaders must be aware of the connection between stakeholder perception and values (Gregory & Willis, 2023). As a result of the continuous change in the world, society, technology and more, what it means to be a leader is constantly evolving (Gregory & Willis, 2013).

Strategic Planning

While the formality of strategic planning can vary between organizations, its common purpose is to influence an organization's strategic direction and integrate both deliberate and emerging strategies. It can be defined as "a more or less formalized, periodic process that provides a structed approach to strategy formulation, implementation, and control" (Floyd & Wolf, 2017, p. 1758) and it generally includes a strategic review, meetings and generation of a strategic plan. According to Nicholas (2016), it consists of alignment on the organization's mission and corporate strategy; setting financial and non-financial goals and objectives; developing action plans; allocating resources; communicating the mission and strategy; monitoring and measuring results and progress; and reassessing and revising as needed along the way. Strategic reviews and audits, stakeholder analysis, SWOT analysis, core competencies analysis, scenario planning, environmental scanning, and financial and operations audits are tools and techniques that are commonly leveraged by organizations throughout the strategic planning process (Nichlos, 2016). An integrated and communicated

planning system best serves the organization and the level of formality (or lack

of) should suit the organization, as should the people and tools involved. Strategic

planning is a highly institutionalized function, and therefore has a high degree of

legitimacy (Floyd & Wolf, 2017). Strategic planning literature debates whether

or not there is a positive correlation between strategic planning and organizational

performance, but suggests there likely is (Floyd & Wolf, 2017). Despite being

commonly practiced and its perceived relationship to positive organizational

performance, it has fallen out of popularity in literature (Floyd and Wolf, 2017).

The role of the strategic communications practitioner in strategic planning

is absent from strategic planning literature. One decades-old source cites that the

contribution of marketing is to define what is important to customers, ensuring

that they are the final point, and evaluating the market by analyzing customers,

competitors and strategic choices (Biggadike, 1981). This literature indicates that

stakeholders and customers are an important part of strategic planning, as is

understanding the reference environment. These elements are aligned with

strategic and proactive role of strategic communications. Yet, this has not been

explored in strategic planning literature at all, let alone since the business

landscape has changed and the role of communication and public relations has

been elevated.

Strategic communication management

For the purpose of this paper, the term *communication management* will encompass both strategic communication activities and strategic public relations management.

Strategic communication is a practice that uses communication management and public relations to support organizational goals by cultivating high-quality, long-term relationships with publics or stakeholders who are affected by the actions of the organization or make demands upon it in relation to issues of importance to them (Grunig, 2006). The process to accomplish this begins with considering the thoughts and behaviours of publics and providing this intelligence to the organization's decision makers (de Beer, Steyn, & Rensburg, 2013). Strategic communication aims to influence organizational leaders to balance their goals with stakeholder expectations, help them to understand that trust is earned by actions not words, prevent and prepare for crisis, and support the long-term survival of the organization (de Beer et al., 2013).

The communications leader must view the organization from a helicopter view, seeing it as stakeholders, both internal and external, see it. Aside from the CEO, this is a unique position in the organization, as most specialists take the viewpoint from their functional area, such as finance, HR or legal. While this often leads to a close relationship with the CEO, it also calls for the communications leaders to challenge decisions, ensuring that stakeholder reactions have been considered. Because organizational opportunity and risk are driven by stakeholders, the communication leader guards both (Gregory & Willis, 2023).

While executive leaders may have an organization centric view, the communications leader will take a stakeholder centric view (Gregory & Willis, 2023). Researchers state that helping an organization determine its purpose is a key function of communications management. Purpose must be founded on authentic values and enables the organization for authentic communications with stakeholders via the organizational narrative, in order to build value capital, legitimacy, and social license to operate. The stakes of getting this wrong are high – the organization may cease to exist (Gregory & Willis, 2023).

While not always associated with communication management, it spans other disciplines, such as marketing, and is used to self-present and promote the organizations through all leaders (de Bussy, 2013). Strategic communication can cross traditional communication disciplines and differentiation between traditional communications activities is decreasing (Hallahan et al., 2007).

Communicators play the strategic role between the organization and its reference environment through environmental scanning (White & Verčič, 2001). In addition to building relationships, environmental scanning can reduce the risk that organizational decisions might negatively affect stakeholders, protecting against revenue loss, regulation and legislation infringements, negative publicity and lost or missed opportunities for revenue (Grunig, 2013). A strategic communicator can directly impact CEO performance and success (Grunig, 2013).

Participation in Strategic Management

The Excellence Study, a ground-breaking, multi-year study on communication management and public relations commissioned by the International Association of Business Communicators (IABC), demonstrated how excellent public relations make an organization more effective.

According to the Excellence Study, communication managers must participate in the organization's strategic management and have access to the dominant coalition in order to enhance organizational effectiveness (Grunig & Grunig, 2013). The dominant coalition, a pivotal concept in public relations theory, is a powerful group of insiders who make strategic choices, allocate resources and influence public relations practices (Berger, 2005). It is assumed in this theorizing that the communications leader is influencing the organizations practices, ideology, and choices while operating in the best interests of society and utilizing symmetrical communication (Berger, 2005)

In excellent organizations, individual communications programs are centrally managed to strategically achieve common objectives, such as changing attitudes, behaviours, relationship indicators, or knowledge. This includes programs like media relations, internal relations, government relations, community relations and other stakeholder communication. This results in the organizations becoming more effective by managing conflict and reducing the cost of conflict that results from regulatory pressure and litigation (Dozier, Grunig & Grunig, 2002).

Communications managers are often excluded as permanent members of executive leadership (Berger & Reber, 2013), despite evidence put forth from the Excellence Study that indicates the link required for communication managers to enhance organizational effectiveness is participation in strategic management (Grunig & Grunig, 2013). In contrast with findings from the Excellence Study, which provides evidence that "the organization is best served by the inherent diversity of perspectives provided by marketing and public relations when those functions remain distinct, coordinated, yet not integrated" (Grunig & Grunig, 2013, p. 55), the chief marketer or chief human resource officer often represents communications at the executive level. In this case, the communications function may lose its ability to provide strategic management to the organization because its stakeholder focus is narrowed to consumers or employees, respectively. Furthermore, it typically results in asymmetrical communication which has consistently been shown to be a detrimental strategy for cultivating relationships (Grunig, 2013).

Today, communications leaders are working side-by-side with executive leaders to develop organizational character and building engagement, reputation and trust for the organization. Oversight of corporate brand stewardship has increasingly become a communications function, as opposed to marketing, so that more diverse stakeholders are considered in the corporate brand experience and ensuring organizations meet stakeholder needs while creating societal value. They are working closely with human resources leaders and other executives to enable cultures that thrive on innovation, continuous learning, data and being customer

centric. Communications leaders are driving the adoption of communications technology to create value for the organization (Page, 2019).

According to Wilson (2016), the strongest indicator that a dominant coalition will include communications in organizational decision-making is their perception of communication as a strategic management function. Other indicators include their perception of substantive autonomy and a high value placed on organizational openness to the environment. This indicates that:

> "when dominant coalition members perceive that the public relations department has high levels of knowledge and expertise in enacting the manager role, value open information exchange with the environment, and perceive that the organization has power to determine its own mission, goals, objectives, policies, and priorities, the public relations department will be seen to have a high level of participation in organizational decision making" (Wilson, 2016, p. 226).

In order for a communications leader to become a trusted advisor to executive leaders and therefore optimize their contribution to organizational strategy, they must understand both the environment in with the organization operates and the operational context of the organization (Willis & Gregory, 2023).

Gregory and Willis (2023), propose the four-by-four model of strategic communication. This model considers strategic communication on four levels: society, corporate, value-chain and functional, mirroring business strategy. This model identifies which stakeholder groups can both collaborate and hold to

account organizations at each level and contends that communications/PR can make a leading contribution at all of them. It also asserts that permeating all public relations considerations at these levels are four constants, or attributes which require ongoing consideration: context, brand, leadership and communication as a core competence. External stakeholders are represented by the outer ring and should be considered as a dynamic network spanning the four levels. Stakeholders can be transient in this network and the power they hold may change, they can have multiple stakes and the interaction they want to have with the organization may change depending on the context. This model is meant to be a comprehensive methodology that has traction with senior leaders when explained.

Institutionalization

When communication management becomes standard in an organization, stakeholder relationships become the responsibility of all leaders, and not communication managers alone (de Bussy, 2013). This can be achieved through institutionalization of the function, which is "the process of infusing 'rule-like' values and procedures into an organization and sustaining them over time, regardless of circumstances or of the individual personalities and philosophies of the entity's main leaders" (Zucker, 1977, as cited in Curry et al., 2013, p. 207). When this process occurs for the communications function, it provides stability through change and adaptation, such as a change in management (Curry et al.,

2013). When the function is institutionalized, practitioners have a greater license to operate and increased legitimacy within the organization and in society (Gregory et al. 2013). Furthermore, an institutionalized communication function is more likely to practice communications as a bridging, as opposed to buffering, activity (Grunig, 2006). Buffering is a defensive activity that protects the organization from change and is the method of public relations that gives the practice a bad reputation. Bridging, on the other hand, develops and transforms organizations through building linkages with stakeholders (Grunig, 2006), cultivates relationships, reduces spin, and has the potential to contribute to the social welfare of the organization's stakeholders (de Bussy, 2013). The institutionalization of strategic communications is increasing, demonstrated by the number of communications leaders being involved with strategic planning, an increased number reporting directly to the CEO, increased budget for evaluation, integration with other functions (allowing for bridging with stakeholders), evidence of increased importance of proposals put forward, and an increasing number of communications departments. This evidence of institutionalization comes from the USA, but the trends are evident in multiple countries (Gregory et al., 2013). Measurement of communication/PR programs can facilitate the process of institutionalization when it establishes links with the organization's objectives and when it confirms long-term success (Invernizzi & Romenti, 2009).

Symmetrical Communications

Strategic communication is best practiced as two-way symmetrical communication, which is based on a balanced effort between two groups with the objective of mutual understanding. When practiced this way, strategic communicators bring about symbiotic changes in the behaviours, attitudes and ideas of their organizations through research and dialogue with their publics (Grunig, 2001). It is in contrast with asymmetrical models of communications, which in include press agentry/publicity, public information and two-way asymmetrical communications, which do not aim to achieve mutual understanding, but rather to disseminate messages (Grunig & Hunt, 1984). Asymmetical communications has consistently been shown to be a detrimental strategy for cultivating relationships (Grunig, 2013). The evolution of social media lends itself to practicing two-way symmetrical communication as it provides a platform for departments throughout an organization, such as legal, human resources, marketing and information technology, to learn about stakeholders (Duhé & Wright, 2013).

Trust

There is not one consistent definition of trust in communications management literature (Fisher, 2018). One definition states that trust is assured reliance on the character, ability, strength, or truth of someone or something (Merriam-Webster, 2022), where "something" refers to the organization. Trust is measurable and changes with an organization's actions, and is based upon competence and ethics (Edelman, 2020). According to the most recent Edelman

Trust Barometer, society is in a cycle of distrust, fueled by disinformation and division. Yet, trust is the ultimate currency in the relationships that organizations can build with their stakeholders (Edelman, 2023).

Reputation

A positive reputation can contribute to an organization through both financial earning and protecting it from competitive threats (Schreiber, 2011). In the business landscape of empowered stakeholders, these stakeholders demand that organizations are responsive to their needs and interests, thus elevating the importance of reputation as an intangible asset.

The Institute for Public Relations offers two definitions for reputation. From the perspective of the organization, reputation is "an intangible asset that allows the company to better manage the expectations and needs of its various stakeholders, creating differentiation and barriers vis-à-vis its competitors" (Schreiber, 2011, para. 8). To stakeholders of the organization, it is:

> the intellectual, emotional and behavioral response as to whether or not the communications and actions of an organization resonate with their needs and interests. To the extent that stakeholders believe that the organization meets their needs better than can competitors, they will behave toward the organization in desirable ways, e.g., invest, join, support, etc. As companies meet the needs and interests of stakeholders over time, they increase their reputation resilience and diminish their reputation risk,

providing themselves with a "halo effect" that can serve them well in times of trouble" (Schreiber, 2011, para. 9).

Reputation is an enduring, strategic, and perhaps the most critical asset that a corporation possesses, and research has suggested that the valuation of intangible assets cannot be ignored as they are so central to organizations (Schreiber, 2011).

Despite its significance, this critical intangible asset is often not reflected in financial statements. Cravens et al. (2003) suggest a reputation index to attempt to measure and manage the value of reputation, considering components of a reputation, including products and services, employees (all levels), leadership and governance, external relationship (suppliers, partners, competitors, investors, environment, society), innovation, value creation, financial strength, strategy, culture and intangible liabilities. Managing reputation based on a measurable index is an important step in recognizing reputation as a significant value driver and providing relevant and accurate information about a company's market value (Cravens et al., 2003). The significance of reputational assets are often only realized when an organization is sold or valued by markets and business leaders recognize their significance (Gregory & Willis, 2023).

Stakeholder Relationships

Stakeholders are groups of customers, employees, media and local communities that have a relationship with the company and are therefore invested in it in some way. As such, they should participate in determining its future direction (Freeman, 1984). One of the ways strategic communications creates

value for organizations is through the important intangible assets of relationships. According to Grunig (2006), the imperative of communications management is the cultivation of high-quality, long-term relationships with publics or stakeholders who are affected by organizational actions or make demands on the organization in relation to issues of importance to them. Identifying stakeholders in a strategic way is necessary in order to build relationships with them and to communicate with them in an effective way. Eight common categories of stakeholders include: customers, donors, member of associations, government, community, investors, media and employees. In order to influence strategic decisions as they relate to these stakeholders groups, the communications function must be empowered by the dominant coalition (Grunig, 2006).

To avoid stakeholders pressuring the organization to change, the organization must satisfy the goals of stakeholder and solve problems, while also doing so for management. Understanding these wants and needs is done through environmental scanning and symmetrical communication. It is challenging to measure ROI for good relationships, but according to executives and communications leaders, good relationships "reduced the costs of litigation, regulation, legislation and negative publicity caused by poor relationships; reduced the risk of making decisions that affect different stakeholders; or increased revenue by providing products and services needed by stakeholder (Grunig, 2006, p. 159). The quality of relationships between an organization and its environment play an important role in the long-term success of an organization (de Beer et al., 2013).

Smith (2012) differentiates public relations from other functions, particularly marketing, based on relationships being distinct from other activities and not being tied to the consumer dollar. In this perspective, relationships are defined as "a system of mutual interdependence around common interest towards which resource (stake), attitudes, and behaviours are contextualized" (Smith, 2012, p. 840). In this view, relationships are considered to be a system of linkages built on overlapping interests. Furthermore, Smith (2012) states that public relations is not directly tied to getting the consumer dollar. The literature behind this theory borrows from communication psychology.

Different segments of stakeholders require different communication strategies and relationship development to most effectively communicate (Grunig, 2006). The Situational Theory of Publics (STP) is a tool to segment these groups and determines the best approach to communications activities and strategies. It addresses why stakeholders seek information and identifies whether their communication behaviour is active or passive. It assists in environmental scanning and moves segmenting stakeholders beyond merely being a demographic breakdown (Grunig, 2006).

Rawlins (2006), suggests a model for identifying and prioritizing stakeholders groups which includes: "1. Identifying all potential stakeholders according to their relationship to the organization; 2. Prioritizing stakeholders by attributes; 3. Prioritizing stakeholders by relationship to the situation; 4. Prioritizing the publics according to the communication strategy" (p. 1).

The prevalence of concerns for environmental, social and governance has increased. Stakeholders have expectations of CEOs and the organizations they lead, including corporate social responsibility for their own interests and operations, and acting with integrity as it relates to issues that impact stakeholders. Reputation and performance are linked to this, and so in managing relationships, considerations must be given to a wider range of stakeholders and their expectations (Gregory & Willis, 2023).

Strategically managing stakeholder relationships can directly impact the performance and success of an organization by reducing the risk of making organizational decisions that negatively affect stakeholders and protecting the organization against revenue loss, regulation and legislation infringements, negative publicity, and lost or missed opportunities for revenue (Grunig, 2013)

Research Problem

The role of being a CEO shares fundamentals with the role of being a strategic communications leader. According to Gregory & Willis (2013), "public relations and leadership are joined at the hip as strategic, interactive and social processes. They are inextricably linked, rather like the stands of a Helix running through organization systems and communities (p. 35)". Furthermore, "is it stakeholders that leaders need to work with to achieve organizational goals and this is familiar territory for practitioners working in the public relations profession (Gregory & Willis, 2023, p. 35)." Executive leaders function at the highest organization level, owning business strategy, reputation and operational oversight.

Communication management and public relations literature suggests that communications professionals, when granted access to the dominant coalition and included in strategy formulation, can help to produce positive results for the organization (Grunig & Grunig, 2013). This is achieved through their role as environmental scanners, boundary spanners, reputation managers and experts in stakeholder relationships, symmetrical communication, trust and ethical decision making. This research will explore how and to what extent strategic communication can impact strategy formulation and implementation to contribute to a successful business. The geographical focus of this research is limited to Canada.

Research Questions

RQ1: *What strategic communication frameworks, models and tools are available and relevant to organizational strategy formulation and implementation?* This question reviewed strategic management, communication management and public relations literature to review and suggest frameworks, models and tools. It also sought practical knowledge interviews with communications leaders and executives.

RQ2: *How and to what extent do executive leaders expect CCOs to contribute to strategy formulation and implementation?* This question explored executive leader expectations in strategy formulation and implementation and relationship of the senior communicator to the executive leadership team, including reporting structure and accessibility of executives.

RQ3: What are the unique elements of strategic communication that can contribute to strategy formulation? This question explored the advantages that a strategic communication professional can leverage to contribute to the success of their organization.

Research Methods

In-depth interviews

As the name suggests, the in-depth interview is a research methodology conducted with one individual interviewing another for one to three hours, that can be analyzed either qualitatively or quantitatively using a content analysis. It provides a level of understanding that is deeper than other quantitative and qualitative methods. The in-depth interview is best suited to research questions that require in-depth explanation of 'why' and 'how', such as those found in this research. The main advantage that the in-depth interview provides is a deep dive into a research question or topic. Disadvantages are the cost and time it takes to conduct, the results cannot be generalized, and researchers may find that they have limited access to the individuals that would be the best source of information for an interview. Conducting an in-depth interview includes setting the location, creating the interview schedule, and analyzing the data. It is best to record the interview for the purpose of analysis given its length (Stacks, 2017). The in-depth interview was chosen as a research method because of its ability to provide rich detail and glean the insights and opinions from the leaders being interviewed and to earn diverse perspective on the research questions. The in-depth interview

portion of this research was reviewed by and received approval from McMaster University's Research Ethics Board.

Content Analysis

A content analysis applies defined rules to content in order to treat it objectively and systematically, creating a degree of reliability and the ability to measure validity, and thereby providing a method of quantitative analysis to qualitative data (Stacks, 2017). There are two levels of analysis. Manifest content measures units that you can see and count, such as words or symbols, individuals or roles (characters), the entire message (items) or measures of time and space. Latent content, on the other hand, attempts to measure themes and deeper meanings, with the measurement being things like fairness or positive versus negative press coverage. To conduct a content analysis, units of analysis are categorized, a sample is selected, and the units are coded. Often, a sampling method must be used to select the documents that will be analyzed. These can be probabilistic (simple random, systematic random, and systematic stratified random) or nonprobabilistic (Stacks, 2017).

Data Collection

In-depth interviews

Potential interview participants were approached with a request to participate in a research interview via email, LinkedIn or through a mutual connection. A sample of the interview recruitment letter can be found in Appendix A. A recruitment post calling for participants was posted on LinkedIn

and Twitter and be found in Appendix B. Potential participants were identified as

either a communications leader or an executive leader. Once their participation

was confirmed, an interview guide was sent in advance of the interview. The six

executive leaders were sent an interview guide for executive leaders, which can

be found in Appendix C. The six communications leaders were sent an interview

guide for communications leaders, which can be found in Appendix D. The

interview guide consisted of eight questions. Many of the questions were the same

for both executive leaders and communicators. Three questions were asked in

slightly different ways to each groups. The 60-minute interviews were conducted

between December 9, 2022 and February 11, 2023 via the Zoom platform and

recorded with permission from the interviewees. Interviewee details can be found

in Appendix E.

Content analysis

The nonprobabilistic sampling method was used to collect the sample of

strategic plans. This was to ensure to the sample represented different types of

organizations, different sectors and different regions across Canada. A

representative sample including the type of organization can be found in Table 1.

All were easily accessible online. Three private sector organizations were

approached but were not willing to share their strategic plans for the purpose of

this research. The founding year of the organizations, the year the strategic plan

was created, and the number of years that the plan is intended to cover can also be

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found in Table 1.

Table 1

Representative sample of organizations in content analysis

Organization	Sector	Year organization was founded	Year of strategic plan	Length of strategic plan
Toronto Zoo	Public, agency	1974	2020	Not given
Protein Industries Canada	Nonprofit, agency	2018	2019	5 years
Ontario Federation of Agriculture	Nonprofit, agency	Not available	2021	5 years
University of Saskatchewan	Public, educational	1907	2018	7 years
Canadian Public Health Association	Nonprofit, agency	1910	2021	5 years
Agriculture & Agri-Food Canada	Public, government	1994	2022	2 years
City of London	Public, government	1826	2019	4 years
Olds College	Public, educational	1913	2018	7 years
Tourism Nova Scotia	Public, agency	1923	2018	5 years
Vancouver Police Department	Public, agency	1886	2022	5 years

Data Analysis

In-depth interviews

The recording of each of the 12 interviews was first transcribed via the

Zoom platform. A combination of the transcription and recording was used to

perform a qualitative content analysis of each interview individually using the

Interview Analysis Template found in Appendix F. Once the individual

interviews were analyzed, the six interviews in each interview stream

(communications leaders and executive leaders) were analyzed together to

determine linkages to the themes in the literature review and the research

questions. The final step of analysis was to compare and contrast the

communications leader analysis with the executive leader analysis.

Content analysis

Ten strategic plans were analyzed using a quantitative content analysis. Of

these, two were translated to another language. In both cases the second language

was French. This analysis was conducted to seek evidence of reputation

platforms, symmetrical communication, stakeholder engagement and other topics identified during the literature review. The code book can be found in Appendix G. Coding was performed by one coder.

Results

RQ1: *What strategic communication frameworks, models and tools are available and relevant to organizational strategy formulation and implementation?*

The following interview question was asked in the same way executive leaders and communications leaders: What frameworks, models and tools do you leverage during organizational strategy formulation?

As demonstrated in Figure 1, the executive leaders and communications leaders shared a robust list with some crossover. The additional explanation provided by the interviewees about each model, framework and tool on this list is provided in Appendix H.
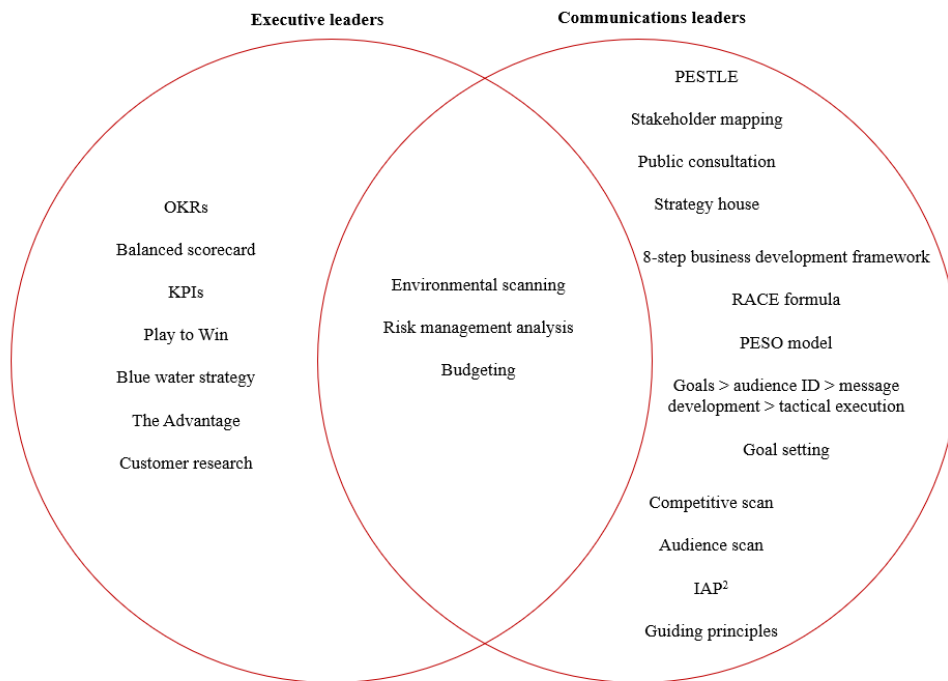
The executive leaders shared multiple tools, and then some went into detail about the frameworks they use. Two of the interviewees talked about using outside consultants to facilitate and two of them stressed that the individual leading strategy is an important factor. Another commented that often time tools were just a flavour of the month. Models come and go depending on the group. Sometimes they created robust, solid conversation, other times they caused the group to struggle in the minutia of a model that did not get to the root what

needed to be talked about.

Figure 1

Tools, models and frameworks

Executive leaders   **Communications leaders**

PESTLE

Stakeholder mapping

Public consultation

Strategy house

OKRs   8-step business development framework

Balanced scorecard   RACE formula

KPIs   Environmental scanning   PESO model

Play to Win   Risk management analysis   Goals > audience ID > message
                                          development > tactical execution
Blue water strategy   Budgeting
                                          Goal setting
The Advantage

Customer research   Competitive scan

                                          Audience scan

                                          IAP[2]

                                          Guiding principles

Environmental scanning, vision and OKRs were each brought up by two

executive leaders. Interviewee EL-06 went on to explain the organization's shift

to the OKR framework. Strategic planning in that organization had been done on

an annual basis, which stemmed from having to demonstrate to key stakeholders

what they been able to accomplish in the last 12 months. As an economic

development organization, this limited the kind of horizons that this type of work

requires, and they needed to move to a multi-year strategic plan. This changed the

conversation to one about making positive progress against a higher-level

strategic objective, but it did require a different way of thinking and a different

way of getting key stakeholders to hold the executive leader accountable. In this

case, OKRs are reported in quarterly segments towards the long-term plan. The objectives are more specific and include an element of how, which then cascade into specific tactics and actions that are measurable. The next step is to determine how these targets will be hit.

Interviewee EL-02 explained the strategic framework leveraged within her business unit. The philosophy is creating a strategy that is built on consultation with partners and true listening, which meets the needs of internal staff, is in touch with the business, and meet the needs of the organization. This involves moving towards using this framework in daily work right down to decisions about products or service offers being developed. Internal collaboration and alignment are created by having the right people at the table to make micro decisions. Doing this work internally will foster the experience of true consultive grassroots strategic planning and set the stage for this work to happen with external stakeholders. Another important element of this strategic planning framework is good financial information. Transparency about financial information is critical to inform strategic decision-making. Developing the right culture is important also, as this creates the confidence for leaders to lift their heads and look towards the long view. Continuous planning, proper KPIs, monitoring and measuring help to ensure the business is on the right track. The vision has been set for the next ten years, creating a long view for the organization.

EL-03 made the point that strategic planning is a big job, and as such needs a dedicated facilitator who knows what they are doing. In this organization,

strategic planning starts with a stakeholder needs assessment or environmental scan that helps to identify what the organization is doing well and what the gaps are. This leads to a conversation about how to keep doing what the organization does well and how to fill gaps.

Key insights from communications leaders include:

- The tools that are used must be appropriate for the organization. The culture of an organization may not align with a 20-page communications plan.
- Tools are helpful internally to create common understanding about the approach, how communications works and how it is done most effectively and in a professional and ethical manner.
- Consultants can be valuable to facilitate this process.
- The approach can be mixed and customized.

One communications leader spoke in detail about the framework of their organization. A new strategy was required because a new executive leader had come in with a different vision for the organization and wanted to take it in a different direction. This required digging into the value proposition of the organization and new skill development. The strategic planning framework called for a high degree of stakeholder consultation. Different models were used, one being the IAP[2] model from the Institute of Public Participation and International Association for Public Participation. This framework helped to determine what the organization is promising to stakeholders, which include options like a

touchpoint, informal consultation, formal consultation, meaningful engagement or co-creation. A lot of work was done to keep the community informed, communicating the need for change, letting people know who is making the decisions, explaining the why, what the change was, the implications and helping people to understand what does and doesn't affect them. This work led to expressing the yearly goals, operational goals, and people's own personal professional goals. Once the engagement feedback was all distilled, the strategy fell out of this. Prior to public promotion, the communications team worked with the strategy team to create a meeting in a box, which meant having a draft strategy along with key questions and a manager's toolkit. These served as an interview guide for each business unit leader and director to structure a conversation with their team. These were called meaning-making sessions, and the purpose was for people to distill wants in the strategic plan and understand what it means for teams and individuals by fueling visionary, open-ended questions around how to accomplish this, what the individual can do, how it applies to individual roles, asking the individual how they see themselves in it and what they can contribute. The feedback from these meetings was taken and used to make needed adjustments to finalize the plan. Once the plan was finalized, it was launched broadly and promoted. The promotion included a road show for the president to unveil.

In another organization, strategy starts with building the vision and mission for the next ten years, and then the board and executive team decide on the pillars. From there, initiatives fall out from these pillars. In this organization, the pillars

span functions and functions support across the pillars. This means that strategic goals are not siloed to a department, but rather that cross-functional cooperation is required to achieve them. Communications does more work under the pillar that speaks to organizational culture, as both brand and employee communications sit under this pillar.

One interview question explored the four-by-four model of strategic communications (Gregory & Willis, 2023) with the interviewees. Executive leaders and communications leaders were both asked if they were familiar with the model and if they thought it integrated business strategy and strategic communications. The executive leaders were also asked if it mirrored the way they think about business strategy.

None of the executive leaders had seen this specific model before, although two of them reporting seeing similar types of models. All six of the executive leaders interviewed considered it to mirror the way they think about business strategy. All commented positively on the model. Four of the executive leaders interviewed agree that this model integrates business strategy and communications. The remaining two were neutral. One commented that the most important thing about models is whether or not they create the right questions and steer the conversation to determine what is most important for the organization.

Four of the communications leaders had not seen the model before, while the remaining two had seen it but not used it. It received a mixed review from communications leaders, as summarized in Table 2.

Table 2

Expectations executive leaders have of communications leaders

Positive	Neutral	Negative
•The idea of constantly thinking about stakeholders. •Highlights the challenges that communicators face in being strategic (leadership and context) as opposed to tactical (core competencies and brand). •Brings all of the different elements of strategy and strategic communications together. •Integrates strategic communication and business strategy, especially with the recognition that stakeholders are critical piece. •Has all the core elements and would be helpful to communication holistically or overall. •Would work well with an organization that really understand their accountability to their stakeholders. •Brand and leadership spanning the whole funnel is good. •The Canadian Public Relations Society definition for public relations is the strategic use of communications to build relationships that serve the public interest and meet society and stakeholder needs, but also business goals and objectives and to help organizations thrive, and this is well represented in this model.	•Perhaps more suited to corporate business as opposed to public sector. •Embedded communication functions makes sense. •Leadership could be in a different hierarchy, with core competencies and brand falling out of that. •Unclear how it works from a practical standpoint. •Likely works in perfect circumstance, but have to be flexible as external influences impact the model. •Unclear what the diagram means. •Next question would be determining if this is a helpful tool in communicating strategy. •Would merge corporate and society together.	•Culture is important, yet missing from this model. •Missing the explanation of where Equity, Diversity and Inclusion (EDI) and Corporate Social Responsibility (CSR) fit into the model. •Missing reputation and CSR. •Even though executive leaders likely know this innately, this model would not be an effective tool to communicate to them. •Too complex with too much movement. •Audience is missing, and therefore it is unclear who the organization is communicating with. •People, a core asset of an organization, and culture are missing, Culture eats strategy. •Customer experience is missing

RQ2: How and to what extent do executive leaders expect CCOs to contribute to strategy formulation and implementation?

Communications leaders and executive leaders were asked the interview question "in your current organization, how and to what extent is the communications function involved in strategy formulation?" in the same way.

According to communications leaders, they are involved with strategy. In some organizations, the communications function goes hand in hand with strategy. In others, it depends on the situation. Interviewee CL-01 works very closely with a director of strategy, reporting into the same vice-president and sharing resources. In their last strategic plan development, the two functions were completely integrated. The communications team has the responsibility of rolling it up and integrating it into internal communications. Similarly, interviewee CL-06 works in tandem with a chief change officer to do strategic planning. In this organization, the chief change officer is accountable for planning, with a

department that includes institutional research and professional and organizational development. The major role that communications plays is helping them to get the level of engagement required to make the plan highly consultive, collaborative, and created in partnership with stakeholders. The role of communications is to determine the engagement framework. To do this, the communications team determined big questions to ask stakeholders, both internal and external. The outcome of this is being able to perform a content analysis on the responses to the questions to determine topics for future focus groups as part of the planning process. The strategy fell out of the engagement feedback. Likewise, Interviewee CL-03 is at the table, lending opinion, giving guidance, and thinking about the work that this will mean for their team. Communications spans all the pillars of the strategic plan in this organization, so the communications function is highly involved in development. From CL-02, communications becomes involved if there is a part of the business that has more reputational considerations. This is a vertically integrated organization and is therefore very diverse in its operations. Interviewee CL-04 works within an integrated marketing and communication function, but is still very involved in strategy formulation. Marketing and communications is a strategic pillar in this organization.

According to Interviewee CL-05, communications is never as involved as it should be. Additional insight from this communications leader points to the function being responsible for helping to form business strategy through refining business goals, suggesting that executive leaders have lost focus. These people get busy with regular business, memos and sales, and they forget about the overriding

goal of the organization. The communicator can step back and push the executive leaders to explain their two or three overriding goals as an organization.

Furthermore, communicators are boundary spanners and being at the table enables them to be aware of the external environment, goings on, policy decisions, programs, and other things that are happening on projects, which leads to understanding stakeholders and what matters to them. It allows communications to bridge information from the organization to the stakeholders, so they are not caught unaware, as well as for the organization to understand stakeholder needs and bring them to the attention of management before operational decisions are made. This helps to avoid being offside of stakeholders, earning license to operate and preventing protests and other negative stakeholder activism. Having this seat allows a communication leader to be able to shape decisions as they are being made and not just brought in as a firefighter to clean something up after it is too late. Not only should a communicator provide counsel where something might go off the rails before it happens and intervene, but this allows them to seize opportunities that will tell a positive brand story.

The responses to this question from executive leaders that were interviewed echoed this. All responded that their organization integrated the communications function into their strategic planning. Each went on to explain this further in their organizations. EL-01 explained that communications is linked to everything the organization does, as a member-based and sector-based organization. EL-05 spoke about communications and strategy going hand in

hand, attributing this partly to the organization being an industry leader as well as

a private company.

According to one executive:

> For me, as a strategic leader leading a business unit in a fast-paced
>
> growing part of the business, communications is one of the key thrusts and
>
> the communications professional that I have chosen to work with will sit
>
> with me shoulder to shoulder at the executive table helping me make some
>
> of the most important strategic decisions within the business that will
>
> inform our business success, company performance around revenue, as
>
> well as ensuring that I have alignment with my very diverse staff
>
> complement, and as well as a significant growth area around our
>
> community engagement priorities, including such things as new
>
> investment from funders like government."

Two of the executive leader interviewees talked about the critical role that

communications plays in implementing strategy, one referring to communications

as the connective tissue of the organization executing its objectives. Another

pointed out the important role communications plays in keeping stakeholders

abreast with where the strategy is taking the organization in the future and getting

stakeholders on-side with the direction. In addition to being part of organizational

strategy development, EL-03 explained that functional leaders throughout the

organization will write strategic plans for their functional areas, which stem from

the overarching plan. In one organization, the communications function is represented in strategic planning by a marketing and communications executive.

A number of other executive functions that have a role in strategy development were mentioned in the interviews. These included a chief operating officer, chief financial officer, chief information officer, human resources and legal. According to one of the interviewees, each functional leader surfaces issues, research and industry knowledge as it relates to their function.

Implied by several of the executive leaders and explicitly stated by one, the communications function is very involved in strategic planning, but is not expected to lead the process.

The following question was asked in the same way to executive leaders and communications leaders: What is the reporting structure of the communications function in your organization?

The reporting structures are summarized in Table 3.

Table 3

Reporting structure of the communications function

Reported by executive leaders	Reported by communications leaders
Director of communications reports directly to the CEO.	Reports to president and CEO.
Director of communications reports directly to the executive vice-president who is a business unit leader. Communications is decentralized in this organization.	Director of communications reports to a vice-president of stakeholder relations, who is an executive leader. Strategy is a distinct department.
Director of communications reports into the vice-president, external. The VP, external is a new role in this organization.	This has varied for this communications leader. Has always been C-suite, but at times a vice-president of marketing, vice-president of communications, the CEO.
Marketing and communications executive (senior vice-president) would report directly to the CEO, with a vice-president of marketing, a vice-president of communications and a director of industry relations reporting to them. Strategy is a separate senior vice-president.	Director of communications reports to senior vice-president for partnerships and public affairs. Director of strategy reports to the same SVP. The SVP reports directly to the president and CEO.
Director of communications report to the vice-president of marketing, who reports to the president, commercial. President, commercial reports to the CEO. The director of communications has a dotted line to the CEO. A director of government relations and a director of community relations report to the general council, a senior vice-president type of role.	Vice-president of public relations is a member of the senior leadership team and reports directly to the CEO. In this organization, internal communication sits within HR. The director of external communications reports to the vice-president of public relations. A separate person does public affairs and government relations.
Director of communications reports directly to the CEO.	At this small firm, the marketing and communications leader reports to the CEO.

One of the interviewees added that the principal difference with whom you report

is how quickly you can action items. The higher a person reports, the more

quickly they can follow through with recommendations because a bureaucratic

process can take longer. This is easier to avoid when reporting to the CEO.

Another commented that a centralized communications team results in a high

degree of boundary spanning.

The executive leader who responded that the director of communications

reports to a vice-president of marketing went on to explain that there is dotted line

reporting between them because it is important for the director of communications

to know where the organization is going from an operational standpoint and to be able to express this. The vice-president of marketing has a good handle on what is happening at the executive level, but not the full picture, as their focus is on the main part of the business and how to sell products to customers. There may be other corporate objectives and strategic initiatives related to government relations, community relations, and other things that are important to the CEO that play into corporate strategy. The CEO works directly with the most senior communicator to ensure that communications are consistent with corporate strategy and to help advance and implement it. The communicator must work with the CEO to understand the direction of the corporate strategy and the various tentacles that bring it all together, in order to communicate effectively to stakeholders.

To further explore the role of communications in strategy development, this question was asked in different ways to executive leaders and communications leaders. The executive leaders were asked: Does the executive team responsible for strategy formulation include the communications leader? The communications leaders were asked: How accessible is the executive team responsible for strategy formulation?

The executive leaders responded that in three of the organizations, the communications leader is part of the executive team responsible for strategy. In EL-04's organization, this is through the marketing and communications executive. In another organization, they are involved most of the time, and other times supplemented with consultants with specific expertise. This was explained as being less by design and more based on the workload of the communications

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leader. One of the interviewees added this about the communications leader being included as part of the strategic management team: "We have this person there because they're awesome and they're valuable, and they just happen to also do communications," going on to say they may not be involved otherwise, as it has a lot to do with the individual being an all-star employee with a good understanding of the organization and sector.

In one of the organizations represented, there had been a recent change to decentralize corporate communications. As a result, there is no communications leader involved with strategic planning at the corporate level, but business unit leaders handle their own strategic planning. The interviewee, an executive business unit leader, includes a communications leader as part of the strategic planning team within the business unit. At another organization, the communications leader is not directly included on the team responsible for strategy development, although they are more involved than other directors in the organization.

In the communications leader stream of interviews, this question garnered three types of responses. The first and most common is that the executive team responsible for strategy formulation is accessible or very accessible. Those who responded in this way offered explanations such as communications is a valued function at the organization and working in an open and accessible culture. Some of the daily ways of working they pointed to included daily conversations, opening executive strategy meetings to directors, working on joint projects, management meetings and being intentionally integrated with strategy. Also

mentioned was the work around implementing the strategy, such as creating tool kits and communications materials for town halls and other meetings, along with integrating the strategy into the company's narrative and all communications pieces. One interviewee stated that having an executive leader who understands the importance of marketing and communications is a characteristic that leads to the communicator being involved in strategy formulation. Another stated that doing things collaboratively and in alignment both vertically and horizontally is an important mandate of their executive team.

A second type of response from interviewees stated that they are accessible most of the time, but do not truly buy into strategy. To explain this further, the interviewee went on to say that they will be present in meetings and in conversations but are there to check boxes as opposed to truly buying in to the process. These executives are more engaged with their own department goals than the overall organizational strategy. This leads to important questions not being discussed at the executive level, such as determining shared strategic goals, the impact they have on each other, how they should be prioritized and how they are resourced and supported.

Finally, the third type of response from one interviewee was that it depends on the communicator. That person needs to have the experience and skills to gain access to the CEO.

This question was asked in different ways to executive leaders and communications leaders. The executive leaders were asked: What expectations do

you have about the contribution of the communications function in business

strategy formulation? The communications leaders were asked: What expectations

does your chief executive or other executives have about the contribution of the

communications function in strategy formulation? Table 4 summarizes the

expectations that executive leaders shared.

Table 4

Expectations executive leaders have of communications leaders

· Environmental scanning and bringing forth metrics to aid in decsion making, while adding continuous understanding of key stakeholders, the environment and the industry (multiple mentions).
· Stakeholder engagement throughout the planning process, including early influence with key stakeholders (multiple mentions).
· Understand the potential issues and risk mitigation that may arise from the strategic plan and identify this during the planning process (multiple mentions).
· Launching the strategic plan to stakeholders and creating buzz.
· Strategically communicating about the plan, including determining the purpose of the communication, the audience, the medium and the timing.
· Competency in both internal and external communications.
· Encouraging stakeholders to engage with the organization's communications.
· Ensuring the strategic plan is accessible so that it can be infused in decision making and in behaviour.
· Supporting the executive leader's personal communications, once the trust of that executive is earned.
· Continuous messaging refinement, through working closely with the executive leader.
· Creating a feedback loop to understand how the strategic plan is being received.
· Reporting progress, benchmarking against internal objectives (metrics and measurements)
· Helping stakeholders see the value of the organization.
· Understanding the corporate goals and working very closely with the executive leader.
· A deep understanding of internal and external stakeholders.
· Be demanding of the corporate leader about the long-term vision and priorities for the business.

Environmental scanning and bringing forth metrics to aid in decision making is a key responsibility, according to three of the executive leaders. Two of the executive leaders interviewed pointed to stakeholder engagement as a key expectation of their communications leader, with one of these leaders expanding this responsibility to include early influence with key stakeholders. Two of the executive leaders expected the communication leader to understand the potential issues and risk mitigation that may arise from the strategic plan and identify this during the planning process.

Two of the interviewees further explained that communications leaders have a unique insight compared to other senior leaders. For example, the chief information officer would be thinking about internal efficiency and effectiveness and a chief financial officer focuses on the organization's finances. Communicators are unique in their ability to have information about the whole business. Additionally, other leaders are not as close to key stakeholders like customers and employees, and perhaps do not have the same connection to the industry, and so do not have the same insights and do not bring that same value to the strategy development table.

Another explained the role of the communicator as the business thrust that helps the business look forward, while at the same time staying in tune with what is happening with important stakeholders to inform the decision making moving forward. They most deeply understand stakeholders and what is going on in the business environment. When a communications team is in tune with what the

business is trying to accomplish, they will start developing and directing strategy, which helps to catapult businesses towards success.

Table 5 summarizes the beliefs that the communications leaders shared. One of the communications leaders shared that communications is considered more important now than in previous decades because there are more opportunities for the public to engage and offer their view. Another interviewee stated that it depends on who the chief executive is and their experience with the organization. Existing relationships also factor in, as personalities and relationships are important.

Table 5

Expectations that communications leaders believe executive leaders have of them

· Bring the communications lens to the strategy that is being built out.
· Play a central role in the work that is done externally.
· Build alignment with stakeholders in strategy development.
· Implementing the strategy via strategic communications.
· Develop and manage brand and reputation.
· Metrics to demonstrate progress.
· Integrated planning and analysis.
· What to say, when to say it, how much to say it, who to say it to.
· Work in tandem to help discover key deliverables, key achievements, milestones, turning points, and mapping them out.
· Play role in change management by bringing an understanding of how stakeholders will adopt and react. What messages they need, who they need to hear from, how.

RQ3: *What are the unique elements of strategic communication that can contribute to strategy formulation?*

The following question was asked in the same way to executive leaders and communications leaders: How critical are environmental scanning, boundary spanning, reputation management, stakeholder relationship management, symmetrical communication and ethical decision making to your business strategy?

Environmental scanning

According to the executive leaders interviewed, environmental scanning is "paramount," "everything," "hugely important," "absolutely important," and "very important." Environmental scanning supports strategy development by:

- Providing market intelligence, including what's happening with an organization's competitive set (multiple mentions).

- Understanding how the organization is perceived and trusted.

- How stakeholders view the organization (multiple mentions).

- Lays the groundwork for stakeholder engagement and to seek advice to ensure that the organization is producing a product they want.

Two executive leaders interviewed expanded further upon environmental scanning. In one organization, environmental scanning has recently been built into the organization, including repositioning a communication role to focus on this. Keywords, topics and terms were identified that matter to the work the organization does and where they might have influence. This also allows the organizations to actively listen in order to plan around issues management and provides a continual feedback loop on what is happening in the environment and industry. This allows the organizations to act on issues or speak up about issues

that influence the organization. This knowledge is integrated into strategic planning. Another interviewee added the commentary:

> "For us, when the core of your strategy is customer and then industry, you can't really make it up, so you've got to go and scan it. And also, sometimes we bring bias to the table so having some thoughtful research that you could point to was extremely valuable on that side. We would do it in a few different lenses. Our economics team would give us some great insights and we'd have market analysis, like what are other players in the industry doing, and what might we be seeing in other spots."

Boundary spanning

Boundary spanning is important, although less so in smaller organizations. Two of the executive leaders interviewed touched on the same theme when speaking to boundary spanning, which is that boundary spanning is an expectation of any senior leader, not just communicators. It is a differentiator of a senior leader to see beyond their own functional area and those who make it to the executive table often have an inherent ability to see across the organization more readily than others do. Another leader stated that boundary spanning is the superpower of the communicator, as they "stand on the balcony," looking out and then looking in across the business, attending to the needs of the business at both the macro and micro level, then infusing this into the business, including into strategic planning. Another executive leader pointed to boundary spanning as a way to empower the decision-making delegation, while also ensuring that diverse

parts of the organization are moving towards the same strategic outcomes. People must work together, but generally like to have their own authority and accountability. It is critical that different departments communicate so that they can make decisions with input from others and respect and understanding of how the decisions impact the rest of the organization. The strategic communications function encourages collaboration across business units, which is important to the organization in achieving its strategic objectives.

Reputation management

Reputation management was stated as important to all of the executive leaders interviewed but they did not speak specifically about the role that it plays in strategic planning. The comments about reputation management include:

- Reputation management can be hard to articulate, especially how to measure that on a balance sheet.

- Reputation is about understanding what you are and what you are not, and understanding the commitments that you are making and then fulfilling on them. If an organization is successful in this, it will be successful overall.

- Reputation and brand lead to long-term success. When the only focus is on generating revenue, the organization will only see short-term success with quick wins around money, but will plateau because there is not a foundation of trust. Without a foundation of trust from a business standpoint, an organization cannot scale and grow because it does not have

permission to do so from internal stakeholders through to external stakeholders.

- Reputation is earned from all the decisions the organization makes and the way it works.

- Reputation and credibility are essential to earning the freedom to operate. Burned bridges with decision-making stakeholders decrease an organization's ability to influence them and advance the strategic priorities.

- Reputation is looking out, looking for what to avoid, looking across, seeing around potholes in the future and opportunities to build.

- Reputation helps people, industry and customers understand what an organization is trying to do.

- Reputation allows customers to feel like the product is safe and the organization has integrity and attends to ESG, which is critical to brand and driving sales.

- Having a negative reputation can be the biggest threat an organization has.

- Reputation leads to license to operate and trust.

- Reputation management, issues scanning, and building structure around this leads to trust, which leads to people who are ready to believe what the organization is saying.

The only response to this question that directly spoke to the importance of reputation management in strategic planning is that reputation management can

help stakeholders to see the value of the organization and so the reputation

platform is integrated throughout the strategic plan to demonstrate value.

Eight of the ten strategic plans analyzed in the content analysis showed

evidence of a reputation platform. The content analysis considered mission,

vision, values and governance as evidence of a reputation platform. As

demonstrated in Table 6, mission and vision were most commonly found in the plans, followed by governance and then values. These items were only measured positively if they were explicitly stated. For example, values may have been implied throughout the plans, but for the purpose of coding this was

Table 6

Evidence of reputation platform

	Yes	No
Mission	7	3
Vision	7	3
Values	2	8
Governance	4	6

n = 10

not assumed, and they were coded as 'no'.

Stakeholder relationships

Stakeholder relationships and symmetrical communications went hand in hand

in the responses from executive leaders. EL-01 commented that stakeholder

relationships and reputation management are tied together. This leader also

commented that it is important to listen to all the stakeholders the organization

engages with, but there will be opposing and contradictory views. The job of the

organization is to take the pulse of different stakeholder groups and assign value,

merit and hierarchy. Interviewee EL-04 stated that the organization they lead uses

symmetrical communications to engage customers to test products, which helps

them to avoid missing the mark with a new product. Another leader talked about treating stakeholders like shareholders, through hosting regular meetings and forums and giving them the opportunity to ask questions.

In the organization led by EL-06, stakeholders are the first or second highest priority in strategic planning. As a publicly funded organization, if they are not on side, the funding goes away. Strategic planning and strategic communications allow stakeholders to engage and see transparency in the business, see the value in it, be able to access information about it and for the organization to position themselves as an authority in their sector. The organization considers actions and decisions through the lens of making the relationships with stakeholders stronger. The COVID-19 pandemic created a greater need for alignment among stakeholders and partners because more license to operate is required. Stakeholder groups mentioned include: members, government policy makers, employees, students, parents of students, alumni.

Ethical decision making

Ethical decision making was also important to the executive leaders, with one commenting that the communications leader often brings ethical decision making to the strategy table. Key ingredients to ethical decision making are being honest and truthful, while not creating risks for the business. It involves assessing risks, such as the appropriateness of the organization's actions, acting against the law or acting overly partisan.

Some of the executive leaders questioned the role of ethical decision making in favour of other mechanisms. Comments around this theme included:

- Sometimes the question is more about branding and alignment with brand than it is about ethical decision making.

- It is more so about value-based decision making, which is technically different but functionally similar. This includes things like dignity of the individual, engagement with the community, responsibilities and place in society. A value is a concept and means that something is desirable, and therefore societally acceptable, with a motivating force. It is what guides behaviour, and behaviour is a manifestation of what is valued. Communications supports this by constantly reminding the organization what its values are.

- May not assign a high value to ethical decision making, but rather would say there is an obligation to be transparent and earn the license to operate.

One executive leader stated its importance in the strategic planning process because of the work they do with stakeholders. Decisions are made with stakeholders in mind, which is often brought forth by the communications function. The executive leader sets the tone on ethics, but other roles have a slightly different lens. Considering ethics in strategic planning helps the organization to live its values and operate ethically. It also helps when an organization makes a mistake and misses the mark. A reputation for strong ethics helps the organization to rebound quickly. Interviewee EL-06 added that ethical decision making is tied closely to reputation management and is very important.

There are more expectations about this from stakeholders in the past 40 years, making it important to both practice and communicate it.

From communications leaders, ethical decision making was spoken about with the mindset of strategic communications, not organizational strategy development. Some of the comments about ethical decision making included:

- Professional communications hold themselves and other communicators accountable to a high standard of professionalism, such as those outlined in the Canadian Public Relations Society code of ethics.
- Ethics goes back to the person and their own values, such as it being important to them to treat everybody fairly and equally, while conducting themselves in an honest, open and transparent way.
- The organization should position itself as being ethical and rational, with the aid of an experienced communicator or public affairs professional, which comes back to organization values and culture.
- A good communicator is someone that forces an organization to be utterly authentic. The moment there is inauthenticity is the moment that spin starts. In the end, this will cause reputational damage.
- If the organization has sound principles, it will automatically be ethical.
- Organizations can draw from principles like the Council for the Advancement and Support of Education, the Arthur W. Page Society principles, the Canadian Public Relations Society code of ethics and others to put together their own principles framework.

Table 7 summarizes the prevalence of identifying key stakeholder groups, consideration of their needs, evidence of symmetrical communications, trust building and other communications competencies in the strategic plans that were analyzed.

Table 7

Content analysis of strategic plans

	Yes	No
Identificaton of key stakeholder groups	6	4
Strategic priorities reflect the needs of stakeholders	4	6
Evidence of symmetrical comms (stakeholder engagement)	6	4
Trust building with stakeholders explicitly stated as a strategic priority	5	5
Communications competencies identified in strategic plan	9	1

n=10

Key stakeholder groups identified included: organization members, government policymakers at various levels, industry stakeholders, students, faculty, donors, local communities, animals, team and guests. One organization cited the media and the general public as secondary stakeholders.

The details about the extent of stakeholder engagement varied. One strategic plan provided extensive details, including the duration of stakeholder engagement and the methods used, which included individual interviews, town halls, community roundtables, team planning sessions, environmental scanning, surveying, polling and more. Others limited detail to writing that the plan had been developed in consultation with stakeholders. One of the plans that did not indicate that stakeholder engagement had happened during its writing indicated that it would be conducted in the future.

One of the organizations that was analyzed leveraged the Sector

Engagement Tables model for stakeholder engagement. The organization that

leverages this model is government, with oversight of a sector. This model aims

to create dialogue between the sector and government, with a focus on issues like

agile regulations, sustainability, consumer and market trends, and skills

development, while seeking solutions to systemic issues. Tables are co-chaired by

a sector representative and government official, with membership made up of

sector representatives and academia. The principles of this model call for

outcome-driven results with clear deliverables and measurement criteria, and

being forward-facing, collaborative and unique.

On building trust with stakeholders, one of the strategic plans that was

analyzed indicated that "systems and structures increasingly contribute to building

the culture of trust that is essential to collaboration." This same organization

includes building trust with stakeholders as a strategic priority. Another

organization identified building public trust with stakeholders on behalf of the

sector it represents. A municipal government and a municipal service provider

strategic plan both indicate the importance of being trusted in the communities in

which they operate.

Nine of the ten plans that were analyzed indicated that other strategic

communications competencies were required. This was reflected through the need

for creating and building brand; the need for sharing information, storytelling and

amplification; facilitating surveys and community engagement; media training for

members; communications through evolving digital platforms; corporate and

internal communications; measurement and public reporting; and addressing misinformation.

Discussion

RQ#1: What strategic communication frameworks, models and tools are available and relevant to organizational strategy formulation and implementation?

The interviews revealed a long list of tools that are used for strategic purposes. Communications leaders identified 16 unique frameworks, models or tools, while executive leaders brought forth 11. The former may include tools that would be better utilized for communicating about a strategic plan, as opposed to its development. Environmental scanning appeared more than once in both interview streams, making it the most common tool to appear in this research. Risk management analysis and budgeting also appear in both interview streams. Working towards a created vision and OKRs were mentioned more than once by the executive leaders. Communicators should consider adding these to their strategic development tool kit when working with executive leaders on strategy development.

When expanding upon the strategic framework that their organizations use, both communications leaders and executive leaders went into great detail about the importance of stakeholders and stakeholder engagement in the strategic planning process. Yet, these were not often linked to a specific tool, model, or

way of engagement. This is especially true of the executive leader stream of interviews. Throughout the literature review, interview and content analysis, many frameworks and tools were identified. The literature identified the Situational Theory of Publics (Grunig, 2006) and the model proposed by Rawlins (2006), which builds upon the Situational Theory of Publics, as models for stakeholder analysis. While the importance of stakeholders was a common and important theme in the response to Question 5 and throughout the interviews and content analysis, specific models were not suggested. This is perhaps an area that communications professionals should consider having a deeper understanding of.

The 4x4 model of strategic communications was new to most of the interviewees, especially the executive leaders. Yet, the response towards it was more positive than negative and executive leaders reflected that it mirrored the way they thought about business strategy. This could be a helpful model for strategic communications to contribute to strategy development and to leverage at the executive level. However, as the model raised questions about its use, the practitioner would have to be very familiar with it and understand how to apply it to the organization for it to be effective. Showing the model to the interviewees raised several negative comments about missing elements, such as culture, reputation, customer experience, EDI and corporate social responsibility, so there would need to be an understanding of where those fit into the model. Most importantly, it is a complex model and must be delivered to executive leaders and strategic planning teams in a way that adds clarity rather than confusion. Several tools, models and framework were identified throughout the interviews. The

majority were tools that contribute to a part of strategic planning, whereas the 4x4 model is a holistic model that represents strategic planning as a whole, coupled with strategic communications. While this is generally a benefit, it may not be helpful if another function is leading strategy and using a different model. As some of the interviewees pointed out, communications is an important function of strategy, but not the driver.

RQ#2: How and to what extent do executive leaders expect CCOs to contribute to strategy formulation and implementation?

Communications leaders and executive leaders were generally aligned in their sentiment that the communications function plays an extensive role in organizational strategy development. While not always, strategic communications frequently goes hand in hand with strategy. In other organizations, the function is involved with strategy but not to the same extent. The sentiment that the communications function plays an extensive role in strategy development was shared slightly more by the executive leaders than the communications leaders who were interviewed. This is also demonstrated through the reporting structures where the communications leader and strategy leader reported into the same executive and the many examples of a communications leader and strategy leader working side by side. This supports the Page (2019) finding that communications leaders are working closely with executives on building organizational character, engagement, reputation and trust for the organization. This participation in

strategic management, as asserted by Grunig and Grunig (2013), is required for communications managers to enhance organizational effectiveness.

Of the 12 organizations represented in the interviews, nine are structured with the most senior communications leader reporting directly to the CEO. In the remaining three organizations, the most senior communicator reports into a marketing and communications leader. One of these three reports a dotted line to the CEO. It was not directly asked, but based on the answers provided, it appears that six of the 12 organizations include a communications leader a part of the executive team. This number increases to nine when including organizations that have a marketing executive. The number of communications leaders involved with strategic planning and reporting to the CEO is an indication of communications being institutionalized in organizations (Gregory et al., 2013), like strategic planning itself is (Floyd & Wolf, 2017). An interviewee stated that communications and strategy are similar functions and require integration and alignment, and perhaps the way of the future is more communications leaders with strategy in their portfolio. This researcher suggests that this would be beneficial to the communications profession, because, as strategy is an institutionalized function (Floyd & Wolf, 2017), this would add legitimacy to the communications management profession.

Question 4 in the interview guide was asked differently to executive leaders than it was to communications leaders. Executive leaders were asked if the executive team responsible for strategy development included a

communications leader, while communications leaders were asked how accessible the executive team responsible for strategy development is to them. The question garnered varying responses from individuals, but as a group, the communications leaders and executive leaders were fairly aligned. A theme that surfaced throughout the interviews is the importance that the individual plays in earning a seat at the strategic management table. This was brought up multiple times, primarily by executive leaders. One of the executive leaders stated that not only must they be highly skilled, but they should have a good understanding of the organization and sector to add value. Gregory & Willis (2023) would agree, as they assert that understanding the environment in which the organization operates and the operational context are required for a communications leader to become a trusted advisor to executive leaders and optimize their contribution to organizational strategy. According to Wilson (2016), the perception of communications as a strategic management function is the strongest indicator of an executive team including communications. This data suggests that these executive leaders do consider communications to be a strategic management function, although this question was not asked explicitly. The expectations of the executive leaders can be distilled into five key themes:

1. Stakeholder engagement; building alignment with stakeholders in strategy development.

2. Environmental scanning, bringing forth data and metrics.

3. Understand potential issues and risk mitigation.

4. Communicating the plan once it's established and supporting change management.

5. Working with the corporate leader to identify corporate goals and long-term vision.

Theme #1 was reflected by the communications leaders to a high degree in this question and throughout the interviews. Based on this research, there is a high degree of alignment between executives and communications practitioners on this theme. The strategic plans that were analyzed also support this. As identified in Table 7, six of the ten plans analyzed identified the organization's key stakeholder groups and the same number indicated the plan had been developed with stakeholder engagement.

Theme #2 also saw a high degree of alignment between executive leaders and communications leaders in this question and throughout the interviews.

Theme #3 was noted as an expectation of executive leaders in this question, but not communications leaders. However, in Interview Question #5, risk mitigation analysis was noted as a tool used by communications leaders as part of their contribution to strategic planning. Risk mitigation may be an area where communications professionals can increase their contribution to strategic planning.

Theme #4 saw a high degree of alignment between executive leaders and communications leaders. However, this theme calls for a cautionary note for communications to ensure their involvement starts with strategy formulation.

Otherwise, they risk serving the organization through buffering, a defensive activity. This is opposed to bridging, which is based on building relationships with stakeholders (Grunig, 2006).

Theme #5 was not identified by the communications leaders. It was implied in the shorter term, but the expectation from this executive leader was to look longer term and set the direction of the organization. This aligns with the finding by Argenti et al. (2018) that the communications function has been elevated to a more strategic function with accountability in developing the organization's positioning and influencing external forces.

A reoccurring theme throughout the interviews is that the person in the role is important, both the personality and skills of the executive leader and the communications leader. For the executive leader, it depends on their view of communications and their experience with the organization. For the communicator, it depends on the relationships, skills, industry knowledge and environmental understanding they have. The content analysis showed that the executive leader was represented as a spokesperson for the strategic plan in five of the 10 plans analyzed. Despite only half of the CEOs being represented as the spokesperson, it is likely that they are accountable for strategy and overall performance in all of these organizations. According to Porter (1996), making strategic choices and enforcing them is the role of a leader. Nadler (2005) points out the unique challenges of being an executive leader, such as the dynamics of relationships, facing criticism of the business, vulnerability of making tough calls

and loneliness, highlighting the importance of trusted advisors, such as public relations professionals. Given these considerations, it is not surprising that executive leaders are particular about the trusted advisors they welcome into their inner circle.

RQ#3: What are the unique elements of strategic communication that can contribute to strategy formulation?

Generally speaking, environmental scanning, boundary spanning, reputation management, stakeholder relationship management, symmetrical communication and ethical decision making are considered critical to business strategy. The challenge with this question with both executive leaders and communications leaders is linking it to business strategy as opposed to strategic communications.

Environmental scanning was pointed to by both executive leaders and communications leaders throughout the interviews. When asked explicitly about its importance to strategic planning, executive leaders adamantly and unanimously said it was critical. Communications leaders also deemed it as critical, but were more likely to go on to speak about it in terms of communications once the plan had been developed, as opposed to during its development. Thus, environmental scanning may be an area where strategic communicators can better support executive leaders in strategic planning.

Boundary spanning appeared to be less understood than other strategic communication functions. While deemed as critical to strategic planning by some, it was also suggested that boundary spanning is a required competency of any

senior leader. This suggests that boundary spanning may not be a competency that differentiates communications leaders from their c-suite colleagues.

Reputation management was deemed critical by both the executive and communications leaders. Despite each of the executive leaders raving about its importance, the comments that followed did not tie it directly to strategic planning. Comments from the communications leaders were similar. This researcher offers that reputation management is different than the other competencies listed in this question. Rather than being something that can contribute to strategy development, it is an institutionalized function like strategic planning. They are on the same level and must run together like the two strands of a double helix. To support this claim, this researcher points to reputation being an enduring and central intangible asset that can contribute to financial earnings (Schreiber, 2011); that it helps to manage the expectations and needs of stakeholders and differentiation from competitors (Schreiber, 2011); can be measured and thus reflected in financial statements (Cravens et al., 2003); represent a financial asset that is realized when organizations are sold or valued by the market (Gregory & Willis, 2023). Furthermore, the interviewees consider reputation to be understanding what the organization is and what it is not, fulfilling on commitments, a path to long-term success, earned by the decisions an organization makes and the actions it takes, and that it leads to a license to operate.

In regards to stakeholder relationships, the data here suggests that both executive leaders and communications leaders are aware that stakeholders have been empowered to hold organizations accountable (Hynes et al., 2018) and that strategic management of relationships can contribute to an organization's performance and success (Grunig, 2013). Despite stakeholder relationships being deemed as critically important, the interviewees did not go into detail about stakeholder analysis or mapping.

Finally, while ethical decision making was deemed as important to executive leaders, this researcher believes this will be a challenging competency to bring to the strategic management table. The response from the executive leaders suggests there is not a shared understanding of ethical decision making. Rather, they leaned towards other mechanisms such as branding, alignment with brand, values, obligation to be transparent and earning the license to operate. Communications leaders indicated that the profession operates with high standards around ethics and the executive leaders interviewed are seeking this competency from communicators.

The content analysis indicates that symmetrical communications and stakeholder engagement, trust building with stakeholders and communications competencies were of critical importance in strategic planning.

Recommendations

This research indicates that strategic communications plays a significant role in strategic planning and implementing the strategy once it is developed. To earn membership at the executive level, communications leaders should aspire to developing skills and understanding to add value to organizational strategy development. This researcher recommends doing this through three key mechanisms: 1) Stakeholder relationships and engagement, 2) Environmental scanning and 3) Risk management and mitigation.

Both the content analysis and interviews pointed to the importance of stakeholder relationships and engagement to build alignment in strategy development. Executive leaders spoke about this at length and identified that leading or supporting this is an expectation that they have of communications leaders. This is an impactful way that communications can provide expertise and value to executive leaders during strategic planning. The 4x4 model (Gregory & Willis, 2023) provides a model that could contribute to this in a way that executive leaders relate to.

Environmental scanning was raised extensively in the interviews. Communicators are expected to bring forth trends, issues, data and metrics during strategy development. When communicators do this, opposed to other senior functional leaders such as finance or IT, they consider society and broad stakeholder groups, not just their own functional area. Environmental scanning is a meaningful contribution to strategy development.

COMMUNICATION'S ROLE IN ORGANIZATIONAL STRATEGY

Understanding and identifying potential risks during strategy development and recommending how to mitigate them is an expectation that executive leaders have of communications leaders during strategy development. A risk management assessment was pointed to as a recommended tool in the interviews that could be used to most effectively add value to strategy development.

Finally, an unexpected theme that developed throughout this research is that the individual in the role matters. Communicators with c-suite aspirations must ensure they have business and strategic acumen to operate at that level. The evidence provided in this research also suggests that personality and relationships matter. A second recommendation is that competency in 'soft skills' are required as well. That being said, developing relationships may be considered a key competency of a communications practitioner, not a 'soft skill.'

Some of the final points from the executive leaders include strategy fit hand-in-glove and communicating internally and externally is how to move the business ahead with stakeholders and leaders who underestimates the importance of communications does so at their own peril. Another leader relegated communications as a key competitive advantage. This, and the evidence presented thus far, suggests that executive leaders understand the significant role strategic communications has to play in creating business success. The license to operate, as we say in our business, is there. We simply need to meet the expectations of executive leaders, develop business acumen and show up with the right tools.

Limitations & Bias

During this research, there were a number of limitations with both the content analysis and interviews. In the content analysis, strategic plans of private corporations were not accessible, so only public institutions could be analyzed. Due to time limitations, only the researcher did the coding and analysis of the content and therefore inter-coder reliability was not able to be established. Regarding the interviews, participants were primarily recruited from the researcher's professional network. While those outside of her professional network were contacted, only those with some previous connection (such as being connected on LinkedIn) responded. The sample lacked diversity. It should be noted that the researcher is a current employee of one of the organizations studied, which could result in deeper behind-the-scenes understanding of how strategy is developed and implemented at the organization, along with the role of the communications function.

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Appendix A

Email Script for Interview Participants – Communications Leaders
Amanda Macfarlane
Master of Communication Management Capstone Research
Exploring the Integration of Strategic Communication and Public Relations in Organizational
Strategy Development and Implementation

E-mail Subject line: McMaster Study – Exploring the Integration of Public Relations in Organizational Strategy

I am a graduate student in the Master of Communications Management Program at McMaster University investigating the integration of strategic communication and public relations in organizational strategy development and implementation from the perspective of executive leaders and communications leaders. This timely and relevant study will give communications practitioners tools and best practices to contribute to organizational strategy development.

I would like to invite you to complete an online interview through the Zoom web conferencing platform. If you wish to participate in an interview, it will take approximately 45-60 minutes. Instructions for accessing the Zoom platform will be provided in advance of the interview. Participation in this study involves minimal risk. Personal information such as your name, email or phone number will not be shared. Participation in this study is completely voluntary. I will request your consent to record the interview. Fluency in English is required, and participants must currently hold a communications leadership role at their organization, such as Director of Communications, Vice-President of Communications, Chief Communications Officer. Participants must practice in Canada and worked in communications/public relations for more than ten years. I have attached a project information letter in this email for you to review. The attached letter contains details about this study.

Based on the timeline to complete this research study, I would like to interview you within the next month. If you would like the interview questions before we speak, I can send them through email before we conduct the interview. Upon completion of this study, I will be preparing a manuscript to be used to defend the research. Participation is completely voluntary, and you can withdraw from this study any time during the interview and afterwards up to February 15, 2023.

This study has been reviewed and cleared by the McMaster Research Ethics Board

Thank you in advance for your time and consideration. After a week, I will send you a one-time follow-up reminder.

Amanda Macfarlane
Graduate Student, Master of Communications Management
Department of Communication Studies and Media Arts
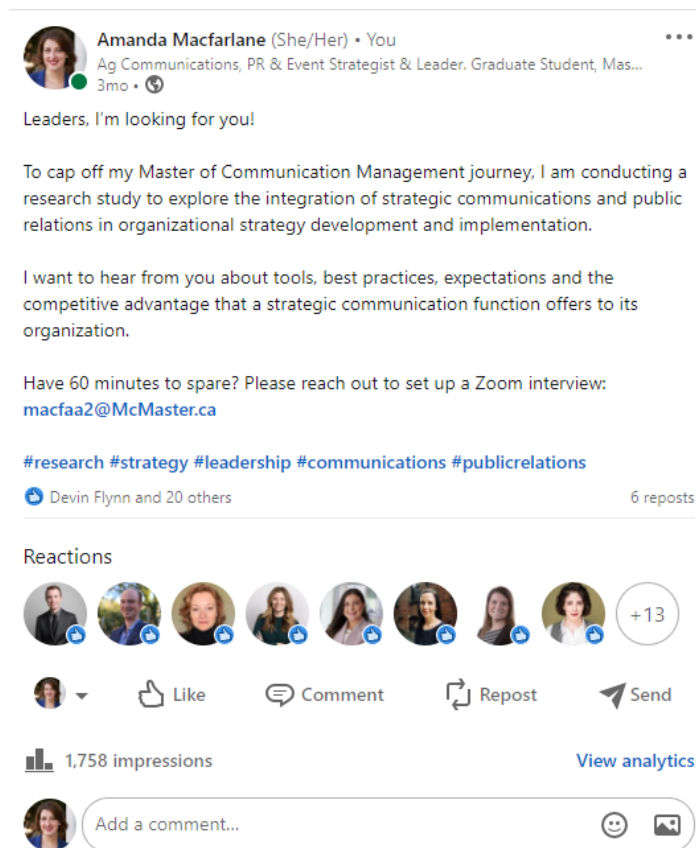McMaster University, Hamilton, Ontario
Tel: 519-240-7849
Macfaa2@mcmaster.ca

Appendix B

Twitter:
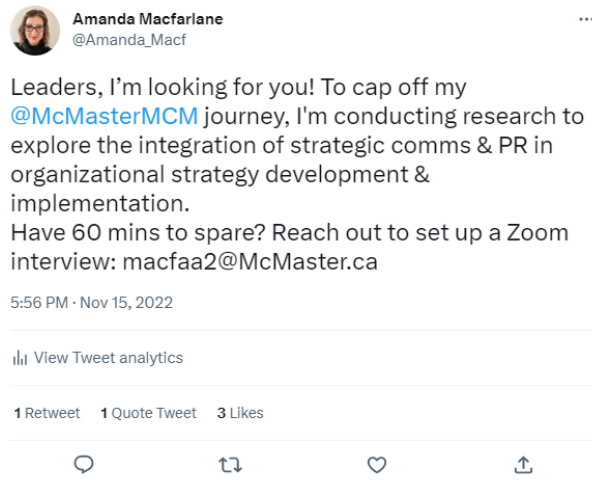
LinkedIn:

Appendix C
Master of Communication Management Capstone Research

Exploring the Integration of Strategic Communication and Public Relations in Organizational Strategy Development and Implementation

Interview Guide – Executive Leaders

In preface to the following interview questions that will be posed to participants by the researcher in one-on-one Zoom conversations, the researcher may ask the participant to "elaborate on that?" or "to help me capture your thoughts accurately could further explain…" The questions are all open-ended and will help the researcher investigate the three overarching research questions in this study.

In-depth Interview Questions for Executive Leaders:

1. Please answer the following demographic questions before we get started:
   a. What is your gender identity?
   b. What is your racial identity?
   c. Where does your organization practice? (Geographic location)
   d. How many years have you been an executive leader?

2. In your current organization, how and what extent is the communications function involved in strategy formulation?

3. What is the reporting structure of the communications function in your organization?

4. Does the executive team responsible for strategy formulation include the communications leader?

5. What frameworks, models and tools do you leverage during organizational strategy formulation?

6. What expectations do you have about the contribution of the communications function in business strategy formulation?

7. How critical are environmental scanning, boundary spanning, reputation management, stakeholder relationship management, symmetrical communication and ethical decision making to your business strategy?

8. Gregory and Willis (2013; 2023), propose the four-by-four model of strategic communication. This model considers strategic communication on four levels: society, corporate, value-chain and functional, mirroring business strategy. This model identifies which stakeholder groups can both collaborate and hold to account organizations at each level and contends that communications/PR can make a leading contribution at all of them. It also asserts that permeating all public relations considerations at these levels are four constants, or attributes which require ongoing consideration: context, brand, leadership and communication as a core competence.

   [Share screen to show graphic of the model]
   a. Are you familiar with this model?
   b. Do you believe that this model mirrors the way executives think about business strategy?
   c. How and to what extent do you believe this model integrates strategic communications and business strategy?
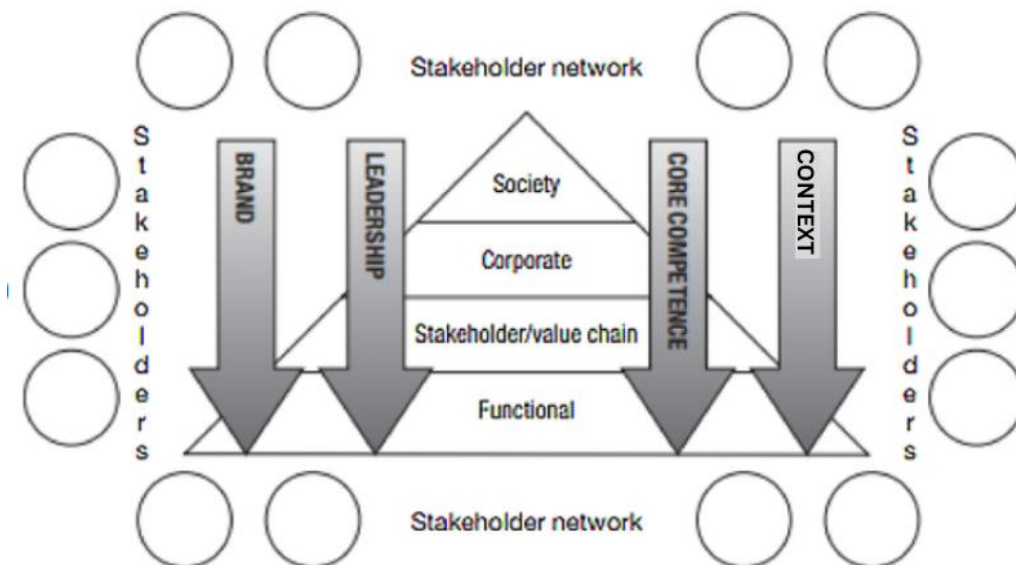
Gregory and Willis' (2023) four-by-four model of strategic public relations

8. That is the end of my questions, would you like to add anything further about the topics we discussed today?

Appendix D
Master of Communication Management Capstone Research

Exploring the Integration of Strategic Communication and Public Relations in Organizational Strategy Development and Implementation

Interview Guide – Communications Leaders

In preface to the following interview questions that will be posed to participants by the researcher in one-on-one Zoom conversations, the researcher may ask the participant to "elaborate on that?" or "to help me capture your thoughts accurately could you further explain…" The questions are all open-ended and will help the researcher investigate the three overarching research questions in this study.

In-depth Interview Questions for Communication Leaders

9. Please answer the following demographic questions before we get started:
    a. What is your gender identity?
    b. What is your racial identity?
    c. Where does your organization practice? (Geographic location)
    d. How many years have you been practicing communications?

10. In your current organization, how and what extent is the communications function involved in strategy formulation?

11. What is the reporting structure of the communications function in your organization?

12. How accessible is the executive team responsible for strategy formulation?

13. What frameworks, models and tools do you leverage to contribute to organizational strategy formulation?

14. What expectations does your chief executive or other executives have about the contribution of the communications function in strategy formulation?

15. How and to what extent do you use environmental scanning, boundary spanning, reputation management, stakeholder relationship management,
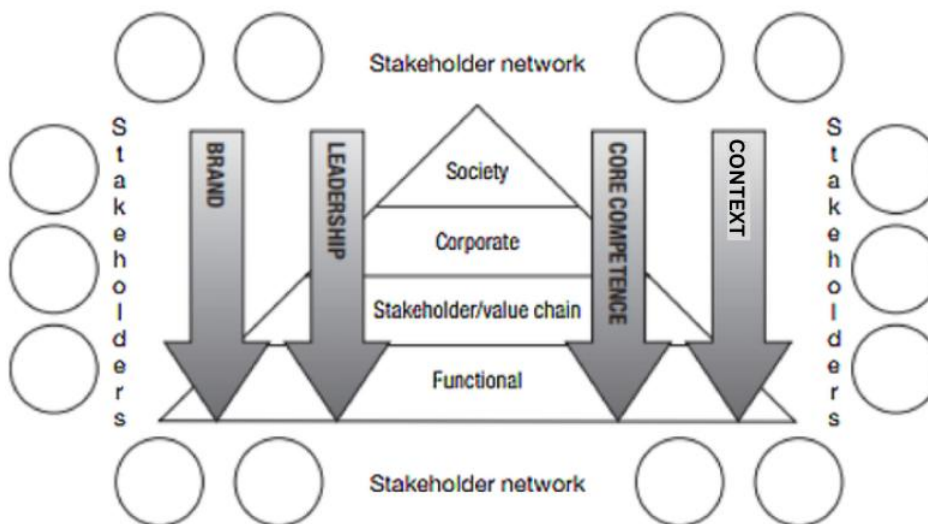
symmetrical communication and ethical decision making to contribute to organizational strategy formulation?

16. Gregory and Willis (2023), propose the four-by-four model of strategic communication. This model considers strategic communication on four levels: society, corporate, value-chain and functional, mirroring business strategy. This model identifies which stakeholder groups can both collaborate and hold to account organizations at each level and contends that communications/PR can make a leading contribution at all of them. It also asserts that permeating all public relations considerations at these levels are four constants, or attributes which require ongoing consideration: context, brand, leadership and communication as a core competence.

    [Share screen to show graphic of the model]
    a. Are you familiar with this model?
    b. How and to what extent do you believe this model integrates strategic communications and business strategy?

Gregory and Willis' (2023) four-by-four model of strategic public relations

8. That is the end of my questions, would you like to add anything further about the topics we discussed today?

COMMUNICATION'S ROLE IN ORGANIZATIONAL STRATEGY

Appendix E

In-depth Interviewee Details

Question 1 Responses

Interviewee	Gender Identity	Racial Identity	Does the organization operate in Canada?	Years of practice	Sector
EL-01	Male	White	Yes	4	Nonproft, agency
EL-02	Female	Caucasian	Yes	6	Private
EL-03	Male	Caucasian	Yes	10	Public, educational
EL-04	Male	Caucasian	Yes	10+	Public, agency
EL-05	Male	Caucasian	Yes	20+	Private
EL-06	Male	Caucasian	Yes	8	Nonprofit, agency
CL-01	Female	White	Yes	15	Nonprofit, agency
CL-02	Female	Caucasian	Yes	17	Private
CL-03	She/her/hers	Caucasian	Yes	25+ years	Public, agency
CL-04	Male	Caucasian	Yes	30+ years	Private
CL-05	Man	White	Yes	30+ years	Private
CL-06	Female	Caucasian	Yes	30	Public, educational

Appendix F

Interview Analysis Template

1. Please answer the following demographic questions before we get started:
[table]

2. In your current organization, how and what extent is the communications function involved in strategy formulation?
[Summary with key points.]

3. What is the reporting structure of the communications function in your organization?
[List each]

4. How accessible is the executive team responsible for strategy formulation?
[Summary with key points.]

5. What frameworks, models and tools do you leverage to contribute to organizational strategy formulation?
[List of frameworks, models, and tools.]

6. What expectations does your chief executive or other executives have about the contribution of the communications function in strategy formulation?
[List of expectations]

7. How and to what extent do you use environmental scanning, boundary spanning, reputation management, stakeholder relationship management, symmetrical communication and ethical decision making to contribute to organizational strategy formulation?
[Summarize each.]

8. Gregory and Willis (2023), propose the four-by-four model of strategic communication.
    a. Are you familiar with this model?
[Yes, no, somewhat]

    b. How and to what extent do you believe this model integrates strategic communications and business strategy?
[List comments and sort by positive, negative, neutral]

COMMUNICATION'S ROLE IN ORGANIZATIONAL STRATEGY

Appendix G

Content Analysis Codebook

Code	Possible Values
Organization	[Name of organization]
Sector	[public/private/non-profit] and then [government, agency, educational]
Age of organization	[Year of origin]
Year of Plan	[Year/Not given]
Span of Plan	[Number of years/Not given]
Is the plan easily accessible?	[Yes/no]
Executive leader as spokesperson in the plan	[Yes/no]
Identification of key stakeholders groups	[Yes/no] [List groups]
Strategic priorities reflect the needs of stakeholders	[Yes/no] [Example]
Is the plan translated into official languages (or other languages)	[Yes/no] [List other language]
Evidence of symmetrical comms (stakeholder engagement)	[Yes/no] [Example]
Evidence of a reputation platform?	[Mission – yes/no] [Vision – yes/no] [Values – yes/no] [Governance – yes/no]
Trust building with stakeholders explicitly stated as a strategic priority	[Yes/no]
Communications competencies identified in strategic plan	[Yes/no] [Explain – i.e. branding, media relations, etc.]

Appendix H

The tools frameworks, and models brought forth by two executive leaders included environmental scanning, vision and OKRs.

- Environmental scanning: using data from the external and internal environment to make strategic decisions.
- Vision: develop this and then work towards it.
- OKRs: Objectives and key results framework.

Each of the following were mentioned by one executive leader:

- Balanced scorecard: an intuitive tool used by a lot of organizations. Goals are set, workload is assigned, measuring and reporting is determined. A simple model that is helpful in day-to-day operations.
- KPIs: created collaboratively with employees.
- Budgeting: money informs strategic priorities.
- Play to Win strategy.
- Blue water strategy: move the organization to where it is less competitive and easier to make a difference, as opposed to blue water, which is complex, busy and challenging.
- The Advantage: Patrick Lynceoni, model around what the organization should do, where it should compete and what's most important right now.
- Risk management analysis
- Customer research: in this framework, the focus of strategic planning is on the customer.

The tools frameworks, and models brought forth by two communications leaders were:

- Environmental scanning: using data and bringing forth to strategic planning team.
- Risk registry: used to monitor key risks in the organization like labour, cyber security threats to the business, changing government and government policy, reputation.

Each of the following were mentioned by one communications leader:

- PESTLE: Looking at trends and data in the environment.
- Stakeholder mapping: Getting a sense of all the key people the organization needs to work with and considering how they should be engaged.
- Public consultation.

- Strategy house: Framework used to develop a strategic plan. Triangle at the top with vision and mission and then four pillars and behaviours under the four pillars.
- Custom 8-step business development framework: Step by step guide to develop and execute on a strategy and finalize what the goals are.
- RACE formula: Framework that uses research, analysis, communication, evaluation.
- PESO model.
- Goals > audience identification > message development > tactical execution.
- Goal setting: Every business unit sets yearly goals and supporting initiatives that are reported on and tracked once per quarter.
- Budgeting: Budget stems from strategic priorities. Budgeting this way stops fighting over dollars, but rather reallocates where they are the most strategic.
- Guiding principles: used for decision making from both an ethical standpoint and to drive towards business outcomes.
- Competitive scan: environmental scan focused on competitors.
- Audience scan: environmental scan focused on audience.
- IAP^2: Stakeholder engagement and consultation framework.