

**ADVOCACY AND ORGANIZATIONAL
ENGAGEMENT**

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ADVOCACY AND ORGANIZATIONAL ENGAGEMENT

Redefining the Way
Organizations Engage

BY

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INVESTOR IN PEOPLE

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Contents

List of Figures	<i>xi</i>
List of Tables	<i>xiii</i>
List of Abbreviations or Acronyms	<i>xv</i>
Prologue	<i>xvii</i>
Introduction – Why Advocacy? Why Now?	<i>1</i>
I.1. Changing Communications Landscape	<i>4</i>
I.2. The Art and Craft of Influence	<i>8</i>
I.3. Toward a Consolidated Approach	<i>9</i>
I.4. Defining Advocacy	<i>9</i>
I.5. Structure and Flow of the Book	<i>11</i>
Chapter 1 What Is Advocacy and Why It Is Important?	<i>21</i>
1.1. Introduction	<i>21</i>
1.2. Definition of Advocacy	<i>22</i>
1.3. Types of Advocacy	<i>24</i>
1.4. Aims of Advocacy	<i>27</i>
1.5. Key Advocacy Shifts	<i>31</i>
1.6. The Business of Advocacy	<i>32</i>
1.7. Key Challenges for Advocacy	<i>33</i>
1.8. Ways to Measure Advocacy	<i>34</i>
1.9. Conclusions	<i>36</i>
Chapter 2 Strategic Advocacy Management – Looking for a Managerial Model	<i>39</i>
2.1. Introduction	<i>39</i>
2.2. Socioeconomic Context and Need for Multi-stakeholder Cooperation	<i>41</i>
2.3. Shifts in Corporate Communications Management and Convergence of the Functions	<i>46</i>

2.4. Toward a Conceptual Model of Strategic Advocacy Management	55
2.5. Discussion and Further Research	63

Chapter 3 From Philanthropy to Sustainability through CSR – What’s Next? Societal Context and Changing Role of the Companies	67
3.1. Introduction	67
3.2. Notion of Trust	70
3.3. Managing Expectations toward the Companies	72
3.4. Sustainability and Advocacy – Bringing Real Benefits of Corporate Engagement to Business	81
3.5. SDG Integration Model	84
3.6. Key Conclusions and Conditions for Effective Corporate Engagement	86
3.7. Further Research	87

Chapter 4 Connecting with the Right Audiences for a Better Impact – Imperatives of the Influencer Marketing	91
4.1. Introduction	91
4.2. Advocacy on the Rise – Influencing Real Influencers	94
4.3. Conclusions	108
4.4. Discussion and Further Research	109

Chapter 5 Defining a Conceptual Model for Advocacy Strategy Development	111
5.1. Introduction	111
5.2. Changing Landscape of Advocacy and Communications	112
5.3. Conceptual Model for Advocacy Campaign Strategic Planning	118
5.4. Checklist for Advocacy Strategy Development	126
5.5. Discussion and Further Research	126
5.6. Conclusions	126

Chapter 6 Shaping and (Re-)defining the Discourse: Content Marketing in Advocacy	129
6.1. Introduction	129
6.2. Discourse Analysis Research and Impacts on Advocacy	131
6.3. Social Media Communications – Shaping Opinions in Ever-changing Environment	133
6.4. Digital Advocacy – Concept with a Powerful Potential	133
6.5. Content Marketing – Applying Theory into Practice	141

6.6. Model for Content-based Advocacy	143
6.7. ABCDE for Content Advocacy Strategy	145
6.8. Conclusions	147
Chapter 7 Doing Good and Being Good or Simply Getting It Right – Corporate Crisis and Defensive Advocacy	149
7.1. Introduction	149
7.2. Crisis Communications – State of Research	150
7.3. Conceptual Model of Crisis Management	155
7.4. Defensive Advocacy – Key Parameters	161
7.5. Conclusions	162
Chapter 8 New Frontier for Advocacy – Toward an Experience-based Model of Engagement	165
8.1. Introduction	165
8.2. New Challenges for Advocacy Management	168
8.3. Conceptual Model for Organizational Advocacy	176
8.4. Discussion and Future Research Paths	178
8.5. Conclusions	178
 Epilogue – What’s Next for Advocacy	 181
References	185
Index	201

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List of Figures

Introduction		
Figure I.1.	Duality of Advocacy.	10
Chapter 1		
Figure 1.1.	Advocacy Funnel.	23
Figure 1.2.	Influence Strategy Components.	28
Figure 1.3.	Advocacy Measurement Framework.	35
Chapter 4		
Figure 4.1.	Evolution of Organizational Digital Strategies.	95
Figure 4.2.	Three-Dimensional Model for Digital Influence.	97
Figure 4.3.	Digital Influence Analysis Funnel.	98
Figure 4.4.	Digital Influence Four-Dimensional Model.	99
Figure 4.5.	Digital Influencer Assessment Process.	103
Figure 4.6.	Steps in Influencer Management Process.. . . .	104
Chapter 5		
Figure 5.1.	Issue Analysis in a Context of Advocacy Campaign. . . .	117
Figure 5.2.	Stakeholder and Influencer Mapping Process.	121
Chapter 6		
Figure 6.1.	Strategic Narrative Components.. . . .	132
Figure 6.2.	Circular Model of Content Management.	143
Figure 6.3.	Model for Strategic Narrative Development.. . . .	144
Figure 6.4.	ABCDE Model for Digital Content Marketing.	146
Chapter 7		
Figure 7.1.	Crisis Communications Management Phases.	156
Figure 7.2.	Difference between Crisis Management and Crisis Communications Management.	161
Chapter 8		
Figure 8.1.	Conceptual Model for Future Advocacy Management . .	176

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List of Tables

Chapter 1		
Table 1.1.	Advocacy Funnel Management.	24
Table 1.2.	Challenges of Advocacy.	34
Chapter 2		
Table 2.1.	Advocacy Learning Profiles.	58
Chapter 3		
Table 3.1.	SDG Integration Model.	84
Chapter 4		
Table 4.1.	Management of the Influence Process: Key Components.	101
Table 4.2.	Conceptual Model for Influencer Management.	105
Chapter 5		
Table 5.1.	Campaign Measurement Framework.	123
Table 5.2.	Model for Advocacy Campaign Strategy Planning.. . . .	124
Chapter 6		
Table 6.1.	Digital Advocacy Team Composition.	136
Table 6.2.	Social Media Channel Overview.. . . .	140
Chapter 7		
Table 7.1.	Conceptual Model of Crisis Preparedness and Response	157

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List of Abbreviations or Acronyms

AIDA	Awareness Interest Desire Action
AMEC	The International Association for Measurement and Evaluation of Communication
B2B	Business to Business
B2C	Business to Consumer
CC	Corporate Communication
CCO	Chief Communications Officer
CEO	Chief Executive Officer
CFO	Chief Financial Officer
CIO	Chief Information Officer
CMO	Chief Marketing Officer
COP	Conference of Parties
CR	Corporate Reputation
CRM	Customer Relationship Management
CSP	Corporate Social Performance
CSR	Corporate Social Responsibility
EACD	European Association of Communications Directors
EC	European Commission
EU	European Union
GRI	Global Reporting Initiative
GSMA	GSM Association
HR	Human Resources
IGO	Inter-governmental Organization
IO	International Organization
ISO	International Standards Organization
KPIs	Key Performance Indicators
MDGs	Millennium Development Goals
NGO	Non-governmental Organization
PA	Public Affairs
PESTEL	Political Economic Social Technological Environmental Legal
PPP	Public Private Partnership
PR	Public Relations

xvi List of Abbreviations or Acronyms

RACI	Responsible Accountable Consulted Informed
ROE	Return on Engagement
ROI	Return on Investment
SDGs	Sustainable Development Goals
SWOT	Strengths Weaknesses Opportunities Threats
UN	United Nations
UNGA	United Nations General Assembly
UNGC	United Nations Global Compact
UNICEF	United Nations Children's Fund
USP	Unique Selling Proposition
WEF	World Economic Forum
WHO	World Health Organization
WOMM	Word of Mouth Marketing
WTO	World Trade Organization

Prologue

This book is a summary of research and reflection about advocacy. I am an advocacy and communication consultant with an interdisciplinary background from social sciences (ethnology and cultural anthropology), media studies, and finally management. My career started in advertisement, passed quickly through market research to land in communication and advocacy consultancy. Ever since I started, I was fascinated to what extent communication and engagement can have a transformative role on the organizations. Not to preach too high, I would claim that communication and advocacy can positively change the lives of many. The issues that once were just short news snap-shots somewhere far away are brought home through digital and traditional media requiring global action. At the same time communication and advocacy change the organizations. The companies need to act in a way that responds to the requirements coming from their stakeholders. This changes the business models and also shifts the role companies have in the society and broader system.

Influence is the most natural thing people do. We want to have “better deal” for us, for our families and for those about whom we care. In order to get what we want, we need to win the argument or convince the others about our points and to do what we want. We do it all the time and in many circumstances. This is why advocacy is accompanying us throughout our lives. We advocate for ourselves, for our families, for organizations that we represent. Paradox being that oftentimes, we do advocate without knowing that we advocate. Similarly, organizations and companies need to permanently advocate for themselves in a busy multi-media and multi-stakeholder environment. Making people care about the issues important for them and making people support their organizational brand and activities becomes a *sine qua non* requirement for an organizational license to operate. Without license to operate businesses and organizations vanish. So, we can claim that organizations can’t exist without effective advocacy.

At the same time, the ways of influencing are changing. Social media, virtual reality, big data analytics – all these new tools and technologies change the way organizations and individuals communicate with each other. With a personalization of communication, companies and organizations are more and more often humanized – they are seen almost as human beings. Corporate citizenship requirements make companies build personalities. The companies behave, act, and are perceived as individuals. This changes dramatically the way they see themselves and the way they engage with the external environments. Organizational engagement is driven by these new requirements and redefines the role both advocacy and communication play.

This book is a combination of research, theoretical modeling, and personal experience. It aims to discuss the newest trends in the organizational engagement from a managerial perspective. There are many books that focus on corporate

communications, and there are several books focusing on the grassroots engagement and campaigning. However, there are very few that look at advocacy from a holistic perspective. In this book, I claim that advocacy is equally relevant for non-for-profit and corporate sectors. I try to also sum up the key trends impacting advocacy and define “so what” from an organizational perspective.

I was pretty frustrated by the lack of models for strategy development and functional management of advocacy during my time as Co-Director of Executive Certificate in Advocacy – one of the first (if not the first) executive education training in the field. Strategic models lists of considerations as well as recommendations included in this book are response to this frustration. They are developed in a way that favors customization and avoids cookie-cutter approaches in the implementation. This last point is extremely important from an advocacy perspective. In management practice, we often suffer from “best practices” approach. The “best practices” in communication and advocacy are everywhere. They create a safety net for those who design organizational engagement strategies. Companies follow the best practices of the previous campaigns in their marketing and influencing approaches. However, the landscape and stakeholders are changing at a pace that nobody can really keep up with. Therefore, a past success is no guarantee of future good performance. We do forget about it far too often and embark at repetitive campaigns that don’t necessarily correspond to the organizational objectives. Moreover, the fact that something worked well for another organization is no guarantee that it will work for ours.

Advocacy professionals can be divided into two main groups. The first one encompasses professionals with business or legal background who see advocacy, public affairs, and lobbying as the key organizational activities linked closely with the core business of the organization or company. The second group presents much more mystical view on advocacy. They want advocacy to be a mysterious activity not scrutinized at a corporate level. For them advocacy is almost like a magic. And magicians are not supposed to report or show how they do their magic. This attitude unfortunately still shared by many advocacy professionals destroys its internal perception. Advocacy brings value to the organization and those managing advocacy need to stand up and measure and report the effectiveness of their activities. This will upgrade perception of advocacy to the level it deserves.

Finally, both communication and advocacy are very often not considered to the core of the business by the companies and organizations. It is true that advocacy professionals in the global international non-for-profit and international organizations benefit from a better statute than their corporate counterparts. But still, in many cases many organizations don’t realize that advocacy might be their “raison d’être.” Without advocacy they cease to exist. Here we can think about trade associations. Their job is to represent the interests to their members and there is no more obvious way than advocacy.

Yet often companies and organizations don’t support these activities with the sufficient budgets. Enough is to compare the EU lobbying budgets of the multi-nationals (published in the EU Transparency Register) with their regional or

even local marketing budgets. Yet the decisions taken in Brussels that are lobbied for or against can define business success or completely destroy a business model.

I would love this book to become for some a simple (simplistic) guide on how to design advocacy strategies. I would love to start a discussion on the organizational positioning of advocacy as a function. At the same time, I would like that advocacy gains the place it deserves among the executives of the organizations. In today's environment many factors impact the business operating environment. Whether we want it or not many people and organizations have a stake in the business of virtually any organization and company. Having a compass to navigate this environment becomes paramount for the future of business. And as I will claim at the end of this book the landscape is set to change and evolve further. This evolution both from a social perspective as well as from the perspective of the advocacy tools and strategies will elevate an importance to engage with even broader ranges of audiences and stakeholders.

Creating engagement means bringing people closer to the organization. While we need to be strategic in both advocacy and communication, we cannot forget about an emotional component. People and stakeholders alike need to believe in the values and purpose of the organization in order to support it. Without this belief the organizations fail to deliver on their promises. As a result, these organizations fail to obtain their license to operate. Being strategic about emotions might sound like a dichotomy but is not, and I hope this book will convince the readers. This dual rational-emotional approach requires though a transformation of the way we think about the role of organizational engagement.

Let's start the journey and make advocacy strategic ...

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Introduction — Why Advocacy? Why Now?

The role of corporate reputation for business results has been analyzed and described for years (Chun et al., 2005). Many researchers studied the correlation between a good reputation and financial performance of the companies (e.g., Roberts & Dawling, 2002):

Good corporate reputations are critical because of their potential for value creation, but also because their intangible character makes replication by competing firms considerably more difficult. Existing empirical research confirms that there is a positive relationship between reputation and financial performance. (Roberts & Dawling, 2002)

Focus of certain researchers on reputation studies has helped to elevate the discourse around corporate reputation to the key concern for communications and external relations management (Barnett, Lafferty, & Jermier, 2005). The role of corporate communication and public affairs department within many companies and organizations is summarized by management of organizational reputation. At the same time, management of the corporate reputation is one of the key functions for the marketing department (Balmer & Greyser, 2006). It also led to commercial success for the organizations that help to manage and benchmark corporate reputation. The example of the Reputation Institute that assesses the companies according to their external reputation is the best witness of this tendency.

The world has changed — this statement can sound trivial and stating the obvious. And to a certain degree it is true that saying that the world has changed doesn't bring much to the discussion. There is no new argument, or unknown fact. However, it is surprising to see how few of the organizations and companies are actually embracing the change that the world has undergone and include it in their communications and external engagement strategies. This change happens at all levels:

- the way organizations are perceived (externally and internally);
- the way organizations are expected to behave and act (higher expectations accompanied with a much more humanized view on the organizations); and
- the way organizations communicate and engage (through different tools, channels, and platforms).

2 Advocacy and Organizational Engagement

These changes are the direct results of the global trends impacting communications and influence agenda. For the purpose of this book we selected five trends that in our view impact the advocacy stakeholder agenda the most.

Trend #1: Low levels of trust – the trust studies show year by year decreasing levels of trust in the society toward the channels (media), organizations (companies and institutions), and information in general (Edelman Trust Barometer 2010–2019). This adds a challenge of influencing opinions and beliefs of those who matter for business as people don't believe the messages they see nor the institutions carrying these messages. It also means that traditional communications model is not effective anymore. Sending messages and hoping for people to interact doesn't work. Organizations need to focus less on information and content they want to promote and more on the engagement with the right stakeholders and influencers. It means creating the new and direct ways of engagement as well as looking for the stakeholders to support the messages.

Trend #2: Segmentation of influence – on the one hand, the number of actors influencing the political and social agenda is increasing. On the other hand, the stakeholders and influencers that are focused on the precise and concrete issues can be more influential than the ones with higher scope or reach. This trend is the most visible in social media. The influencers that are focused on the niche issues/markets have much higher impact on their target audiences than the ones with big audiences (Influencer Marketing Hub, 2019). It creates a real need for the companies to gain an in-depth understanding of their operating environment and develop engagement strategies that are segmented to the needs of all types of influencers. It doesn't mean focusing only on the micro-influencers. It requires deeper understanding of the landscape and better grip on the ripples of influence.

Trend #3: Confirmation bias – people tend to believe more on what reaffirms their preexisting beliefs (Klayman, 1995; Nickerson, 1998). This is hardly a new news. There are several definitions of the confirmation bias which in brief can be described as:

Confirmation bias, as the term is typically used in the psychological literature, connotes the seeking or interpreting of evidence in ways that are partial to existing beliefs, expectations, or a hypothesis in hand. (Nickerson, 1998)

In fact, it is an old psycho-sociological finding that is further accentuated by the digital media environment (Knobloch-Westerwick, Johnson, & Westerwick, 2015). Indeed, social media users are rarely exposed to the information that challenges their perception of the status quo and of the world (Knobloch-Westerwick et al., 2015). More often than not, they see and consume information that is confronting them in their vision of the world and in the vision of a particular issue (Knobloch-Westerwick et al., 2015). Looking at the algorithms

of social media, the information that we see in the social media feeds is based on the pages we follow and interactions that we have (Yin et al., 2016). The advertisement – the best example here is remarketing – meaning targeting of the messages and advertisements based on our previous visits. The same tendency can be observed in the way online audiences are created. One of the most used tools looks at “*alike audiences*” meaning repeating targeting toward the individuals who are similar to the ones previously engaging with the organization. While effective, it can be also limiting in terms of the scope and future opportunities to engage beyond current circle of interest. Equally, results in the search engines are based on our previous searches (Knobloch-Westerwick et al., 2015). Yet interestingly enough search engines top the list of the media that are most trusted by the users (Edelman Trust Barometer, 2019). In fact, it is not in anyone’s business interest to challenge our views as then we might shift to the other media that are more comforting and provide the security of affirmation. As a result, we are constantly reaffirmed in what we already believe in (Nickerson, 1998). This is even more visible in the case of the “digital natives” – growing up in the environment in which digital is the primary source of information. The whole generation is growing up in the environment which is not challenging the status quo of personal beliefs.

Trend #4: Changing expectations from stakeholders and consumers – the consumers and stakeholders expect from organizations to be the active actors in the society (Scheyvens, Banks, & Hughes, 2016). Looking at Trust Barometer study from Edelman, it is apparent that businesses have a growing license to position themselves in the broader social context and lead the discourse beyond their core operations (Edelman Trust Barometer, 2019). At the same time, the decision-makers (including regulators and legislators) expect companies to have a position on the broader societal themes such as sustainable development (Scheyvens et al., 2016). The Sustainable Development Goals (SDGs) framework created by UN in dialogue with private sector and non-for-profit partners created a platform for companies and other actors to work together addressing world’s pressing issues. At the same time, the SDG framework created expectations for the stakeholders to address together the societal issues (Scheyvens et al., 2016). It also provided companies with the opportunities to move away from defensive approach toward proactive one (Scheyvens et al., 2016). While there are still questions about operationalization of the SDGs and the ways the success of SDG implementation can be measured; it is clear that they did change the discourse around sustainability even before they were adopted (Sachs, 2012).

Trend #5: VUCA – volatility, uncertainty, complexity, and ambiguity are the words that define today’s operating landscape for organizations and companies (Breen, 2017). It is important to note and recognize that the change impacts both companies (commercial entities) and non-for-profit organizations. The context of VUCA requires much more agility in business models; it also requires much more flexibility in communications and engagement (Breen, 2017). It also requires constant challenging of the existing engagement

4 *Advocacy and Organizational Engagement*

and influence models (Mack, Khare, Krämer, & Burgartz, 2015). This needs to be paired with a constant foresight related to the stakeholder landscape (Mack et al., 2015). This all means that advocacy is even more important for the companies and organizations alike. Interestingly, companies oftentimes do the foresight into the future of their business model and consumers, but rarely use foresight techniques and methodologies to define their advocacy models.

Based on these trends and a complexity of the environment, advocacy moved from being considered as an “emerging” discipline into the core strategy of marketing and corporate communication. It is reflected by a growing number of professionals having job titles related to “advocacy.” In some cases, this shift is motivated by a willingness to get away from using the “public affairs” job title which is associated with a classical lobbying activity. However, in more and more cases this change reflects a profound shift of priorities within the organizations. The shift which recognizes that in order to be truly influential, the companies need to gain support from multiple stakeholders (Scheyvens et al., 2016; Wood, 2010). And gaining support from the stakeholders requires a concentrated effort and building relationships going beyond the “business as usual,” or current business needs (Scheyvens et al., 2016).

In addition, growing importance attached to sustainability in the corporate context means that companies and non-for-profit organizations work more together (Carbonara, Costantino, & Pellegrino, 2014; Chan et al., 2010; Deaton & Heston, 2010). It goes from punctual cooperation through partnerships to fully fledged public private partnerships (PPPs). The PPPs can be seen as the ultimate vehicles of advocacy for multiple stakeholders (Andonova, 2010). Successful PPPs are built around the common understanding of the interests by stakeholders coming from the various sectors of activity (Andonova, 2010).

1.1. Changing Communications Landscape

Today, people are confronted with more information that they can process at every stage of media consumption. Whether it is traditional media or social media, the information, data, facts, and visuals are everywhere. Frequently, the information is conflicting. Media make lower distinction between the facts and commentary (Maigret, 2007). Navigating this landscape is increasingly difficult. Every single communication channel is getting saturated with facts, data, and knowledge.

At the same time, due to the multiplication of the channels it is increasingly difficult to distinguish between the “real” and the “fake.” Ongoing discussions about the influence of fake news and fake social media on electoral results are a great example of this trend. The scandal of Cambridge Analytica showcased the issue in a pinnacle. The fact of illicit usage of data in order to impact the election results created a buzz all around the world. It can be attributed to a consequence, the trust toward digital information and social media further decreased (Edelman Trust Barometer, 2019). We also observe a simultaneous decrease in

trust toward traditional media and institutions. It creates an unprecedented challenge for companies and organizations to influence their audiences.

The multiplication of data, data sources, and influencers make it even more difficult for companies and organizations to “cut through the noise.” At the same time, thanks to social and digital media, they can engage with their audiences directly. Also, for the first time in history, they don’t have to rely on media broadcasters and can engage with their audiences directly. This created an environment in which organizations need to look holistically at their landscape in order to engage better. The traditional focus and distinction between the key customers and key stakeholders are by far not sufficient in order to influence the agenda and position the company/organization in this changing landscape. In order to position itself in the landscape, organizations need to:

- *Gain in-depth understanding of the communications channels.* Understanding of the technical features of the channels and audience profiles needs to be paired with a good grasp of demographics of the audiences on each of the platforms.
- *Identify the key issues that impact the operating environment of the company or organization.* The key issues usually go beyond the traditional and direct concerns that were on the corporate agenda. It means also understanding of the global issues which can impact a core business of the organization.
- *Following from that, there is a need to identify the ones who influence the opinions and beliefs around these both core organizational issues and global ones impacting them.* This goes beyond an understanding of the legislative and regulatory agenda. In order to do it right, companies need to see who are the ones shaping the discourse around the global topics of a direct or indirect relevance for business.
- *Seek for external partners and organizations* that can be impacted by the same developments in order to build partnerships and coalitions beyond the “usual suspects.” Managing advocacy campaigns in coalitions brings multiple benefits: it shares the burden of the campaign, it showcases a broader industry voice and creates unity between various actors impacted by the social, regulatory, and legislative developments.
- *Communicate with a large group of stakeholders and influencers* in order to shape the landscape and create an enabling environment in which organization can position its messages and its interests. These influencers and stakeholders can ultimately become the advocates of the organization and bring an external support when needed.

Navigating this complex landscape represents a challenge and opportunity at the same time. This is why identifying and understanding the agenda of those who matter becomes paramount for organizational and business success. Without this understanding, the organizations continue to broadcast their messages into the vacuum without being able to identify whether they

are impactful or not. We claim that this broadcasting model defining the way communications and public affairs work is redundant and can create adverse results to the intended ones. For instance, many campaigns focus solely on raising awareness among target groups. However, raising awareness needs to be accompanied by a clear call to action – people need to know “what should they do” with the issues. For instance, several studies have showcased that pure awareness raising without supporting target audiences with a clear call to action can lead to the behaviors that are opposite to the desired ones (Christiano & Neimand, 2017). The study about famous campaign “Dumb ways to die” launched by Sydney public transport authority showcased that campaign led to an increase in numbers of suicides in the public transport – effect opposed to the intended one (Christiano & Neimand, 2017). It happened because the campaign lacked a good understanding of its target audiences and as an effect created adverse effects to the intended ones (Christiano & Neimand, 2017).

Too many organizations concentrate on raising awareness about an issue—such as the danger of eating disorders or loss of natural habitat—without knowing how to translate that awareness into action, by getting people to change their behavior or act on their beliefs. It’s time for activists and organizations to adopt a more strategic approach to public interest communications. (Christiano & Neimand, 2017)

Too often, companies and organizations focus solely on what they want to convey or achieve. The needs of their audiences are frequently forgotten (as is the need to identify who those audiences are). As a result, multiple companies and organizations fall into the trap of over-communicating or communicating missing the target (Christiano & Neimand, 2017). They multiply the channels and messages without any real focus. And focus is essential to engaging with those who matter the most and ultimately driving lasting change (Christiano & Neimand, 2017).

1.1.1. Place of Communications in the Corporate Strategic Management

Corporate communications department traditionally focused on managing the channels used by organization to interact with external world (Cornelissen, 2011; White, 1994). These included owned channels such as website and earned channels (e.g., traditional media reached through media relations activities). The role of the communications department has evolved with the rise of social media channels (Bochenek & Blili, 2013). The new channels created an opportunity for communication professionals to become the drivers of engagement with the new audiences. Communication professionals claimed internal ownership of the social media engagement (Bochenek & Blili, 2013). Indeed, social media combine all media functions in one (Bochenek & Blili, 2013). It includes earned, owned, and paid aspects. As a result, the role of communications departments in

organizations where this department was responsible to manage social media engagement was elevated and entered the territory traditionally reserved for marketing professionals (Bochenek & Blili, 2013). However, with a rise of paid engagement in the social media platforms, the landscape changed again. It is now more and more frequent that social media and digital engagement are driven from the marketing side of business.

At the same time, the role of external relations and public affairs in companies is further strengthened. The role of consumers in the public policy processes has been studied for over 40 years (Ferrell & Krugman, 1978). Multiplication of the stakeholders and their agendas requires from companies to have a more holistic approach to their public affairs activities. Also, the influence techniques evolve from a traditional lobbying to more sophisticated engagement strategies requiring both political communication and campaigning. Consequently, the role of public affairs professionals is more and more focused on building lasting relationships as opposed to gaining access to the decision-makers (Zetter, 2014). Thought leadership and content strategies are rising to become the key tools used in the public affairs activities.

The evolution of the role of communications department within companies is heavily dependent on an organizational learning of the company (Bochenek & Blili, 2013). In an article published in 2013, we proposed a model that looked at the different level of integration of corporate communication department depending on the learning level of organization. It led to the development of five archetypes for organizational models of corporate communication management (Bochenek & Blili, 2013). These were put in the context of three loops of learning: tactical, strategic, and network. Using organizational learning theory was very useful to describe the changes and challenges faced by corporate communication function (Bochenek & Blili, 2013). One of the main conclusions of this study was that the internal position and influence of the corporate communication department depends on the sensitivity of the industry to crisis and focus put into measurement and evaluation of the communications activities (Bochenek & Blili, 2013).

This trend evolved further with the changes and developments of the stakeholder landscape. The role of communications becomes increasingly focused on managing change for organizations (Mazzei, 2014). This requires new types of skills and competencies from the communications professionals (Cornelissen, 2013). In addition, it also redefines the place that corporate communications department has within the organizational structure (Mazzei, 2014). In several cases, it leads to the change of the name of the department in order to include the variety of the functions it has within the organization. It is more and more often seen that the head of corporate communications department reporting directly to the CEO of the company and/or sitting in a management board. Gravity center of the communications department is depending on the leadership view of communications (Communication Monitor, 2018).

The questions on leadership and organizational culture in the ECM 2018 draw out some interesting findings. For example, although 76.5 per cent of the respondents state that the top leader in their organization understands the value of communication, only 57.8 per cent confirm the same for other leaders like those of most work units. At the same time, about 20 per cent of the communication leaders in the organizations surveyed are said to lack leadership excellence. (Communication Monitor, 2018)

1.2. The Art and Craft of Influence

It is increasingly difficult to identify who influences whom in the international socioeconomic context. The traditional distinctions between stakeholders, decision-makers and consumers are less and less relevant with all groups constantly interchanging. In the recent years, often non-traditional actors have had stronger leverage on decision-making than well-established institutional ones (Hall & Biersteker, 2002). There is a similar tendency when looking at the legal operating context. The so-called soft laws (including standards, rankings, and industry-driven frameworks) have more impact on businesses than traditional laws and regulations (Abbott & Snidal, 2000). Soft laws become also an area for lobbying and advocacy. Self-regulation is often used by the industries to mitigate the risks related to industry regulation (Gunningham & Rees, 1997). Indeed, companies might benefit from self-regulation in order to avoid being subject to a regulation/legislation, which could have higher impact on their business model for instance (Gunningham & Rees, 1997). In consequence, often time proactive advocacy approaches (like self-regulations such as creation of industry code of conducts, industry rankings, etc.) become more effective for the companies than the defensive ones (fighting with the regulation or legislation) (Zetter, 2014).

Traditionally, influencing strategies were executed on behalf of companies and industries by lobbyists and public affairs professionals (Zetter, 2014). Simplistically speaking the most important asset of a good lobbyist was his/her list of people on speed dial in their phone. Lobbying was traditionally about “*who does the lobbying professional know.*” Nowadays, the access is less of an issue. Many country and international legislations require decision-makers to consult the constituencies before processing the laws and regulations (Zetter, 2014). Therefore, the challenge is what to do with the access. In the context where meeting regulators and legislators become a right – it means also that more influence groups gain this access. The legislators and regulators are confronted with even more data, positions, and lobbyists. As a result, in order to be effective, the lobbyists and advocates need to come with a clear value proposition for the stakeholders (Zetter, 2018). This value proposition needs to have a cohesive character and showcase consideration toward all the parties impacted by an issue.

Meanwhile, decision-making processes are influenced by a multitude of actors, so it is impossible to know “*everyone that matters*” in any given subject.