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Prof. services firms  
face new challenges

# O'Dwyer's

Communications & new media

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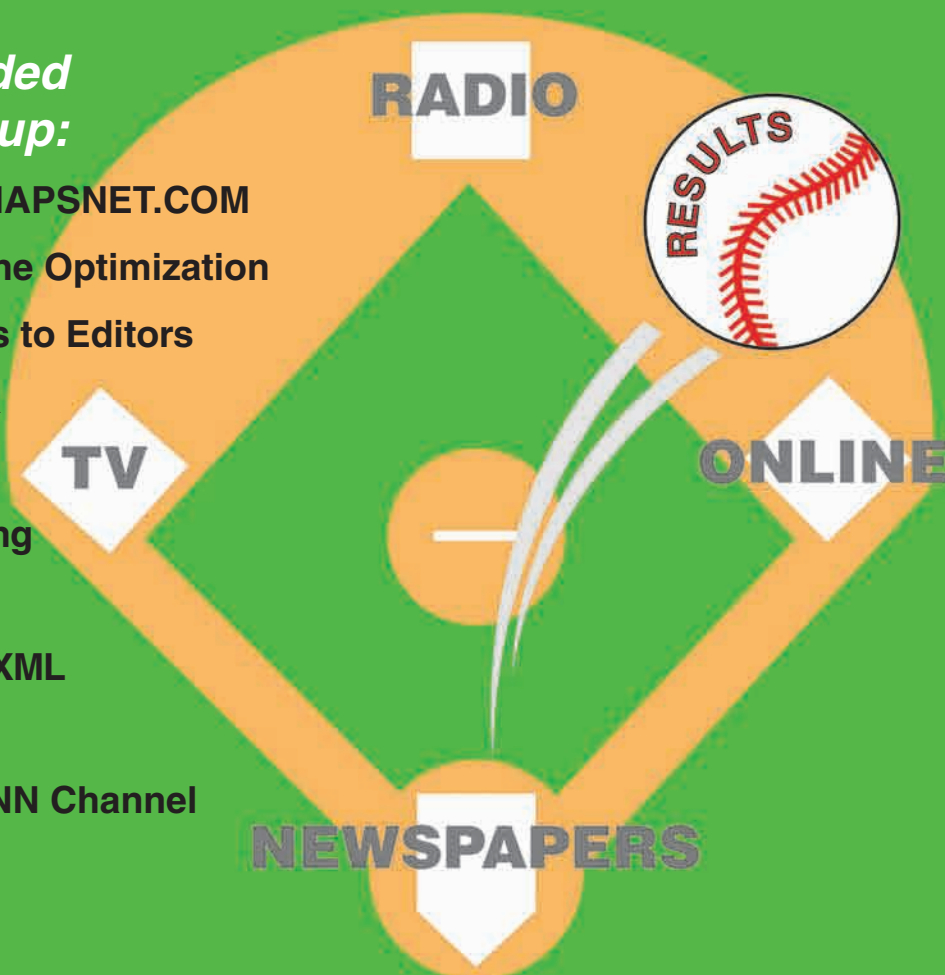
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# Debt talks reveal leaders fueled by ego, not policy

**T**he national disaster better known as the July deficit standoff was an eye opener to anyone whose natural sense of cynicism hasn't glued them permanently shut by now.

We all know the story: The U.S. government had been in a months-long race to raise its debt ceiling. Seems simple enough, but leave it to Washington to weave a Shakespeare-worthy comedy-of-errors. Failure to raise the debt ceiling, we were repeatedly told, would cause us to default on our national loans, which would cripple our economy with rising interest rates and a plummeting dollar. The national credit rating would be shot. Borrowing rates would skyrocket. Mortgages and student loans would become prohibitively expensive. There would be mass defaults, financial pestilence, locusts.

Democrats wanted new revenues. Republicans wanted spending cuts. It doesn't matter what side of the fence you were on: in the end, people with a lot more power and influence than you played Russian Roulette with your money for the chance to dig into the till boxes and politically grandstand for the coming election season. It's the modern Pyrrhic victory.

The biggest losers? Us.

First, there's the fact that both options stunk. Senate Majority Leader Harry Reid's plan wanted to slash trillions from federal spending but didn't bother to account for how the government could bring in additional revenue. House Speaker John Boehner's especially short-sighted plan allowed Congress to raise the debt ceiling only after cuts to programs like Social Security, Medicaid and Medicare. It

shakes down the most vulnerable Americans while leaving the most privileged unscathed. Moreover, Boehner's paltry plan didn't even offer enough to solve the deficit. Congress would have to vote on raising the debt ceiling again before the next election.

Second, there's the fact that neither party seemed willing — publicly, at least — to consider proposals put forward by the other. Boehner seemed content to hold our very currency hostage and alienate members of his own constituency to appease a fringe group of American conservatives who are, for lack of a better word, insane. President Obama, on the other hand, was quick to sideline the Reid plan and throw programs American working families need to the sharks as early as preliminary talks. Both, predictably, then blamed the other for failing to negotiate with an objective of compromise in mind. We all need a strong dollar, thriving economy and vibrant private sector, but both parties seized the opportunity for a showboating chance at political sabotage. Each deal was so politically poisoned it became impossible for the other party to accept anything without a hearty side of humble pie.

The final problem is that both parties lied. Taxing the rich, while helpful, isn't the silver bullet the Obama administration claimed it to be (most economists estimate tax revenues on the rich would lower the federal deficit by about one percent). Conversely, curtailing tax cuts for the wealthiest Americans isn't a "blank check," especially when the deal comes with massive federal spending cuts. Also, to kill a tired Tea Party line: raising the debt ceiling doesn't have anything to do with future spending. It is used to pay the tab for what the government already spent. Big difference.

Then there's the hubris of it all. There's nothing wrong with asking wealthy Americans in 2011 to pay tax rates above their current 1950s rates. Moreover, to call Medicare and Social Security "entitlement" programs is, on its face, insulting. The income disparity in this country has grown exponentially along race and class lines, with black households now earning 20 times less than white households and Hispanics coming in at a not-too-distant 18 percent, according to a new report compiled by the Pew Research Center. Then consider that the same leaders who put us into this mess are the ones who conveniently decide now is the time to cut the fat. If the very idea doesn't get you mad, I don't know what will. ●

— Jon Gingerich

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# Wall Street Journal ed board claims no incidents of hacking

By Kevin McCauley

**T**he *Wall Street Journal* editorial oversight board says it “found nothing to even hint that the sort of misdeeds alleged in London have somehow crept into Dow Jones,” according to highlights from July 25 report published in the newspaper.

A five-member board chaired by Tom Bray, former *Detroit News* Editorial Page Director, was formed to oversee editorial integrity of Dow Jones & Co. after it was acquired by Rupert Murdoch’s News Corp.

The board admits that WSJ has “changed in focus, style and content since coming under News Corp ownership,” but it believes there has been no “political, ideological or commercial pressure” applied by senior management on reporters and editors to influence their news judgment.

The committee faults the WSJ for being slow in pursuing the phone hacking scandal that led to the shutdown of News International’s *News of the World* earlier in

July.

The Journal, however, “is doing much better now with aggressive coverage, fitting placement in the paper, and unflinching headlines.”

The committee knocks a July 14 WSJ report of an interview of Murdoch by Bruce Orwall, in which the News Corp. Chief claimed the crisis was being handled “extremely well in every way possible.” Murdoch admitted to making just “minor mistakes,” and said he was “getting annoyed with the coverage, but will get over it.”

The committee feels that piece allowed Murdoch to “get his side of the story on the record without tougher questioning.” It has discussed the story with involved editors.

As the scandal unfolded, the committee has had “candid, useful meetings” with Editor-in-Chief Robert Thomson and other senior editors. “We have found them open to suggestions about steps to be taken to make sure that no issue of journalistic integrity lurks hidden and that the standards of Dow Jones are reinforced.”

The committee responded to a July 20 request from the Senate about whether it probed now resigned Dow Jones CEO Les Hinton, or if he had any knowledge of the hacking situation.

The panel says that was beyond its mandate of assuring editorial integrity at the WSJ: “No journalist at Dow Jones has even whispered to us before or since Mr. Hinton’s resignation that he pressured him or her or condoned or promoted journalistic misconduct.”

The committee promises to investigate even a suspicion of misconduct. Hinton resigned July 15 in response to the News Corporation scandal.

“We are not apologists for the owners, nor do we constitute a Committee Against Change. We are meant to be monitors of journalistic integrity on behalf of the staff and, importantly, on behalf of this newspaper’s readers,” the committee said.

In July, four U.S. Senators called for an investigation into News Corp., claiming the phone-hacking actions by Murdoch’s *News of the World* in the U.K. raises questions about News Corp.’s conduct in the U.S. ●

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# Study: media/entertainment companies lack digital savvy

**More than 90 percent of media/entertainment executives say they are not taking advantage of customer data to deliver customized content, according to a survey released July 12 by technology and management consulting company Accenture.**

By Kevin McCauley

A whopping 95 percent of media/entertainment executives admit to not having robust digital customer relationship management capabilities in place, while 58 percent say they are in the early stages of creating that ability.

The Accenture study, titled the "Global Media and Entertainment High Performance Study," was performed to identify key characteristics of top media and entertainment companies. It surveyed 130 senior management level professionals across Europe, North America, South America and Asia Pacific working in advertising, TV, publishing, film, music and gaming.

On the social media front, 55 percent say their companies have a clearly defined networking strategy. About four-of-ten (38 percent) see social networking as a way to gain customers intimacy. Seventeen percent use networking to gain sales.

Marco Vernocchi, Global Managing Director of Accenture's media and entertainment group, said the survey shows that respondents have made progress in "achieving the goal of distributing con-

tent via any channel, in any format, to any device, most still need to form a holistic view of their digital consumer so they can monetize their content."

He believes revenue growth in the multi-platform world is "dependent on delivering personalized, consumer-driven content to individual consumers via the right platform."

The study also revealed that 42 percent of executives polled said they expect advertising to be their primary source of revenue over the next two years. ●

## Media News Briefs

### OPRAH TAKES OVER

Oprah Winfrey has decided to name herself CEO and Chief Creative Officer of OWN: Oprah Winfrey Network, a joint venture of Winfrey's Harpo Studios and Discovery Communications.

She succeeds Christina Norman, who was bounced two months ago in a management shake-up. Norman did a four month stint as the third Chief of OWN since it was formed in 2008.

Winfrey says she is ready to dedicate her "full creative energy and focus as the full time CEO of OWN." She had held the chairman spot.

Her two lieutenants and Harpo Studios Presidents Erik Logan and Sheri Salata are taking the same titles at OWN. They maintain their Harpo roles.

Logan joined Harpo in 2008 from XM Satellite Radio, where he was executive VP for programming and broadcast operations. Earlier, he was programming president at Citadel Broadcasting and worked for a decade at CBS/Infinity Broadcasting.

Salata moved to Harpo in 1995 as promotions producer. She rose through the promotion, development and productions ranks to become executive director of "The Oprah Winfrey Show" in 2006 though its finale this year. Before Harpo, Salata made ads for Grey Advertising and Lois/GGK.

Logan and Salata are to work with OWN's interim CEO, Peter Liguori, Discovery Communications COO, to ensure a smooth transition to the fall takeover of Winfrey.

OWN launched Jan. 1 on the former Discovery Health Channel. It is available in 80 million homes.

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# Does your company need a disclosure refresher?

**Recent high-profile cases highlight the dangers awaiting companies that fail to abide by the SEC's rules on Regulation Fair Disclosure.**

By Gene Marbach

**R**egulation FD has been in place since 1999 and, as most investor relations professionals know, it was adopted to address the problem of selective disclosures of material non-public information by publicly-traded companies.

The news of late has been filled with cases of insider trading such as the major case involving the hedge fund Galleon Group. In addition, there was a highly-publicized matter involving the leak of internal memos at computer giant Hewlett Packard ahead of the release of the company's quarterly earnings report, which caused HP to issue its financial report a day earlier than originally planned.

Violations of Reg. FD can result in serious sanctions by the SEC, not to mention the loss of corporate reputation. The following offers some insights into how to avoid such problems.

## Office Depot case shows need for policy

According to a cease-and-desist order adopted by the SEC issued in October 2010, Office Depot's CEO and ex-CFO prepared talking points for one-on-one calls with selected analysts in the second quarter of 2007. During these calls, Office Depot signaled to analysts that it would not meet expectations. It did this by drawing the analysts' attention to prior cautionary statements by Office Depot and recent public statements by peer companies regarding the slowing economy and decreased earnings. As a result of these calls, analysts quickly lowered their earnings estimates for Office Depot.

Office Depot continued these calls despite the analysts' concerns about the lack of public disclosure. Upon being advised of these concerns, the CFO instructed the director of investor relations to call the company's top 20 institutional investors to relay the same talking points to them. The company did not make a public disclosure announcing the lowered earnings expectations until it filed a Form 8-K, six days after the calls to selected analysts began.

Office Depot Inc. and the SEC announced a settlement of enforcement

actions against the company, its CEO, and its ex-CFO. Office Depot agreed to settle the action for \$1 million. The two executives also agreed to pay \$50,000 each. Clearly, the one-on-one calls with selected analysts and investors violated Regulation FD and Section 13(a) of the Securities Exchange Act of 1934.

The Office Depot matter highlights the need for all issuers to ensure that all personnel who communicate with the public are aware of the requirements of Reg. FD. According to the Commission, Office Depot did not have written Reg. FD policies in place at the time. In addition, Office Depot had never conducted any formal Reg. FD training prior to the discovery of these alleged violations. Such policies and training should be essential parts of any issuer's compliance program.

## A culture of compliance

Corporate managers and investor relations pros need to remain vigilant to insure that disclosure regulations are being followed to safeguard the company's reputation by fostering an "environment of compliance."

Take the case of American Commercial Lines Inc. The company's former CFO, Christopher Black, agreed to pay the U.S. Securities and Exchange Commission a \$25,000 fine to settle allegations of providing inside information to securities analysts. In agreeing to the penalty, Black did not admit or deny the allegations, according to the SEC release. The agency added that it will not take any enforcement action against the company.

The fine results from a June 16, 2007 e-mail that Black allegedly sent from his home to eight sell-side analysts who covered the company. In the e-mail, Black alerted the analysts that American Commercial Lines' earnings per share would likely "be in the neighborhood of about a dime below that of the first quarter." This took place after ACLI had issued a press release projecting second quarter earnings in line with the company's first quarter earnings of approximately \$.20 per share on June 11, 2007. The complaint also alleged that Black's selective disclosure and resulting ana-

lysts' reports caused a significant drop in ACLI's stock price, which, on Monday, June 18, the first trading day after Black's e-mail to analysts, dropped 9.7% on unusually heavy volume.

In determining not to bring an enforcement action against the company, the SEC cited the following factors:

- Prior to the selective disclosure the company had cultivated an "environment of compliance" by providing Reg. FD training and implementing controls to prevent Reg. FD violations.
- The former CFO's actions were taken without authorization, outside of the control systems of the company.

• The company took prompt action to publicly disclose the information by filing a Form 8-K the same day it discovered the violation.

• The company self-reported the violation to the SEC and provided "extraordinary cooperation" in the SEC's investigation.

• The company took remedial measures, including the adoption of additional controls, to prevent future violations.

## HP case highlights need for planning

Shortly before the release of the company's earnings, a number of memos meant for internal eyes only at Hewlett Packard leaked out and received considerable coverage. One of the memos in question was written by HP chieftain Leo Apotheker. The memo noted that HP was bracing for "another tough quarter" in the May-July period, and that management needed to "watch every penny and minimize all hiring."

HP's "Memogate" highlights an issue that every company faces these days. Those of us in the communications business know that information travels at the speed of a mouse click and, within a few seconds, a corporate reputation can be jeopardized. Not to mention, the mad scramble such an occurrence could touch off as the company takes steps to remedy the situation as HP did by moving up the date of its earnings release.

IROs with the aid of their outside



Gene Marbach

Continued on next page

counselors should review their companies' Reg. FD compliance programs to make sure they are up to date with the latest developments and that their compliance programs are being safeguarded through both ongoing training efforts and control systems. Companies are also advised to have in place an emergency plan for responding to potential Reg. FD violations, one that establishes responsibilities and procedures for determining the proper corrective actions. In addition to preserving the company's reputation, a commitment to Reg. FD compliance not only helps prevent violations from occurring but also cultivates the environment of compliance that the SEC deems significant when deciding whether to bring enforcement action against the company.

Keep in mind ...

No nods and winks. Though the Office Depot executives were careful not to say anything about earnings directly to the analysts, the message was clearly communicated. As the SEC made clear in previous cases, companies cannot evade the requirements of Reg. FD by using code words or phrases to convey material nonpublic information.

Codify your Reg. FD Policy. As

noted earlier, Office Depot did not have written Reg. FD policies or procedures at the time of this violation, and the company had never conducted any formal Reg. FD training prior to June 2007. All publicly-traded companies should have a Reg. FD policy in place and to conduct training frequently.

Be careful when dealing with "the Street" at the end of the quarter. Be especially cautious when the discussions relate to financial results and earnings guidance. In the Office Depot case, the calls with analysts were near the end of the quarter, a particularly sensitive period. If your company needs to provide advance warning of earnings results or otherwise update its financial guidance, do it first in a press release or with a Form 8-K filing. "Jawboning" analysts to change their estimates will only lead to trouble.

Check with legal. In the matter of Office Depot, there is no indication that the CEO or CFO ever asked inside or outside counsel about either arranging these analyst calls or the talking points used by the director of investor relations. A brief consultation with an attorney regarding these types of communications can help prevent inadvertent Reg. FD violations.

**Crisis Planning.** Inadvertent disclosure equals crisis — Check your crisis plan. Does it cover inadvertent disclosure? If it doesn't now is the time to add that to the list of likely events and prepare accordingly.

*Gene Marbach is Group VP at Makovsky + Company. ●*

#### PR news briefs

### WPP MERGES RLM, FINSBURY

WPP is merging New York's Robinson Lerer & Montgomery and London's Finsbury Group to create RLM Finsbury, a move that creates a trans-Atlantic financial and corporate PR combination from two firms that have worked closely together over the years. Walter Montgomery becomes CEO of RLM Finsbury, while Richard Rudd, co-founder of Finsbury, takes the chairman role.

Montgomery says the merger provides a "worldwide platform" to provide clients outcomes that "directly impact their performance and reputation."

The new entity launches with 180 staffers in New York, London, Brussels, Dubai and Abu Dhabi. A Hong Kong office is slated to open during the third-quarter for greater Asian market coverage.

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# Success stories in the integration of PR and IR

**The goals of financial PR and IR are intrinsically different: one is dedicated to reputation building, the other seeks to enhance shareholder value. A good corporate communications plan however, ultimately serves to bridge the gap between the two.**

By Ulrich Siebert

**P**ublic confidence, as well as active and open communication, are crucial for success. "Value Reporting" enriched with non-financial factors bridges the divide between Investor Relations and Public Relations. Both these areas need to pool together their efforts to create a solid basis for growth.

In the competition for customers, capital and talent is a worldwide phenomenon. However, on the other front the revolutionary influence and power of social networks and online based information platforms — such as Twitter, Facebook and WikiLeaks, where anyone can publicize sensitive internal information — has forced companies to rethink their communication strategy. Also, calls for more transparency since the recent global financial crisis and requirements for confidence-building measures pose added pressures on firms. Transparency and credibility are the two key factors; they are the most important aspects of a company's code of conduct and corporate policy. It seems inevitable that the information quality of companies has to be sustained in order to reduce uncertainty, build trust and credibility and thus make a significant contribution to increasing enterprise value.

## Bridging the great divide

Among all the operational challenges that management has to confront, communication is the most important in terms of its value added contribution. In a media world that increasingly thrives on dramatization, textbook-like linear and logical decisions by customers or investors are the exception. An integrated information system is therefore becoming more important since it consistently aims at building public confidence and supports the current and future business activities of an organization.

While PR is primarily committed to reputation building, IR activities are

aimed at stabilizing or enhancing shareholder value or stock prices. However, reputation, moral integrity and market value cannot be forced on the public or capital market, but instead has to be acquired over time. One can also say that IR, with its reporting and mainly past-orientation, systemically transforms internal corporate information into public information. PR takes a different approach: Its current function is to create a positive image with the use of future-oriented topics, which of course should trigger hopeful thinking in the minds of investors.

Though these two instruments play different roles, they are undoubtedly and closely interconnected. The link between current factual financial information and expected future developments is the crucial point that connects IR and PR. Documenting enterprise value and the future success of a company are both communication activities. Critical success factors are therefore marketable products (product development, marketing, sales), and market and growth communication that creates trust — Marketing and PR. Whether or not this succeeds will be unsparingly reflected later in the accounting and reporting of IR. This is why the management of communication is so important for the current and future success of a business. Behind every future cash flow or profit is ultimately an individual customer. The goal is to either acquire or retain them.

## "Soft" factors increasingly important

The complexity of companies, the interactions between market segments, products, regulations, public acceptance and capital markets make it difficult for any one individual to comprehend all aspects. Consequently, enterprise value cannot be determined by solely looking at the profit and loss account, balance sheet or cash flow statement. In addition, professional market participants do not always react rationally due to emotional reasons and time constraint. In order to fill this information gap, non-financial factors have increasingly been incorporated into the reporting system since the mid-1990s. Despite often being reported on, the importance of these factors is only gradually becoming apparent in the field of communication.

In order to effectively communicate and ensure the availability of future cash flows, management must define the activities with which product and market com-

munication will be developed. It is no longer sufficient to only inform capital market participants about objectives, strategies and business performance. Rather, the question should be: In what way are relationships with customer being maintained and new customer groups addressed?

## Key value drivers

With a strictly market oriented communication perspective, the following so-called soft factors become key hard value drivers:

Strength of market position (brand image, strength of marketing, innovation, capability, etc.)

Quality of products and services (long-term nature of products, customer perception of quality, etc.)

Customer satisfaction (loyalty, rate of loss of customers, preferences, etc.)

Corporate culture (CSR, employer branding, employee turnover, etc.)

These non-financial factors determine the quality of management, measured by growth and the implementation of successful strategies. In this view, transparency, public acceptance and credibility are the decisive factors for success.

Value Reporting enriched with non-financial factors bridges the divide between Investor Relations and Public Relations. Both areas need to pool together their efforts to jointly create a solid basis for growth. This may include, for example, issues and events that form the foundation of contacts for sales, marketing and PR activities, resulting in more leads, sales and cash flow.

Given its key function, the communication activities of future PR should provide sales support through the building of public confidence and acceptance, while IR communicates business success through the consistent reporting of financial and non-financial aspects to investors. With this integrated growth-based approach, the quality of reporting and the reliability of forecasts will be increased, giving investors and stakeholders more confidence.

Ulrich Siebert is Managing Partner at Intellisource GmbH in Frankfurt, Germany. ●



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# Unintended consequences of SEC regulation

**A deluge of investment crime in recent years has resulted in a wave of regulatory enforcement. Paradoxically, the SEC's own ordinances may now be responsible for hatching the newest phenomenon in financial malfeasance.**

By John Palizza

**A**t its most fundamental level, investors and corporate investor relations officers are at odds. Under the strictures of the Securities Exchange Act of 1934 and SEC regulations, investor relations officers must disclose new material information to all investors simultaneously. The Securities and Exchange Commission seeks a level playing field for all investors, and rigorously enforces this requirement.

Investors, on the other hand, seek an edge. Money is to be made when you have the best information before anyone else. Rather than a level playing field, they prefer to have it tilted in their direction. Couple this with the fact that there is serious money at stake, you can see how this may lead to some interesting conflicts.

This isn't anything new to the securities markets. Going all the way back to the Pecora hearings following the Wall Street crash of 1929, insider trading has been recognized as a threat to fair and open markets. The intervening years have brought us characters as diverse as Michael Milken (junk bonds), Dennis Levine and Martin Siegel (1980s investment bankers), Ivan Boesky (arbitrager), R. Foster Winans (The "Heard on the Street" columnist from *The Wall Street Journal*), James McDermott (the former CEO of Keefe, Bruyette & Woods who gave tips to his adult movie star mistress) and Martha Stewart. The usual pattern has been a splash of infractions, followed by a wave of enforcement, followed by new regulation. Once people begin to figure out how to game our new regulations, the pattern starts all over again.

## Enter the expert network

We are currently in the part of the cycle where we are experiencing a wave of enforcement actions. According to a June article in *The Wall Street Journal*, over the past 18 months, 49 people have been charged with insider trading and 44 have been convicted or pleaded guilty. The most high profile of these has been the billionaire hedge fund manager Raj Rajaratnam, who was convicted in May following a jury trial.

While a number of the current cases can

be ascribed to the usual motive of greed overcoming fear of the law, an interesting aspect of many has been that they grew out of a relatively new phenomenon — the expert network. And expert networks would not exist were it not for the Securities and Exchange Commission having enacted Regulation Fair Disclosure (Reg. FD) in October of 2000. A bit of background might be helpful here. When they enacted Reg. FD, the SEC was seeking to codify and tighten by regulation what was already in the case law: the requirement that material, non-public information be disseminated to all investors at the same time. The SEC was concerned that certain investors, by dint of their access to company management in meetings for professional investors only, were getting an unfair advantage over all other investors. The new regulations were driven home by a series of enforcement actions against companies the SEC perceived as stepping over the fair disclosure boundaries. Companies, not wishing to incur the embarrassment and expense of SEC enforcement actions, began to lessen the amount of information they gave to Wall Street on an informal basis. The result was that investors felt they could no longer get much of an information edge by talking to the company.

## New rules, old game

The markets being what they are, a paid solution soon sprang into being in the form of expert networks. These are companies that act as brokers between people claiming to be experts in their fields and investors seeking to know information about that field. The experts receive a fee for consulting with investors and the expert network company receives a markup on the fee. The theory behind these expert networks was that Reg. FD was forcing companies to stick to a plain vanilla disclosure script, distributed to everyone at the same time for any information of importance, whereas investors would pay to get information insights before everyone else. It proved to be a good theory, as on Wall Street, time and information are money, and expert networks could help investors with both. For example, if an investor needed to get up to speed quickly on a new company that is

being taken over by a company he already an investment in, paying an expert for an hour or two of their time could be much more efficient than spending a week researching the topic. And presumably the investor could get the information from the expert free of corporate spin and with some insights into the topic that corporate management might be unwilling to discuss.



John Palizza

Alas, like all good ideas, abuses soon appeared. Some expert networks solicited people to act as experts on the companies they worked for, with the implied marketing pitch to investors that they would be able to get an insider's perspective. And lo and behold, some of the experts actually gave out material, non-public information about their companies. Many of these "experts" were in technical fields, such as medicine or technology, and it would be easy to say that they might not be expected to know technical SEC regulations. However, when someone is paying a person large sums of money to tell them about things that are not generally known about their company, it's fair to say that person knows he's doing something wrong. At the very least they are violating their duty of confidentiality to their employer, at the worst, they are violating the federal securities laws.

So there you have it: a great example of the law of unintended consequences. The SEC sought to eliminate the ability of investors to get an information edge by enacting Reg. FD. In the process, they drove the market to create a new product, the expert network, that was much more efficient at identifying people who would be in a position to violate the insider trading laws. It seems sometimes you need to be careful about what you wish to regulate.

*John Palizza is a Consultant at Three Part Advisors in Southlake, TX. He also teaches investor relations at the Jones Graduate School of Business at Rice University. ●*



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# Q2 PR revenues rise despite warning signs

By Greg Hazley and Kevin McCauley

**S**econd quarter revenue for ad/PR conglomerates and services companies reporting in late July showed robust increases, although paltry organic growth and worries over the U.S. economy showed the doldrums of recent years are not yet far enough behind.

Omnicom reported strong numbers mid-month, but its PR division recorded an organic increase of less than two percent, an indication that other units and acquisitions are fueling its increases. France's Publicis, meanwhile, also racked up strong revenue increases for the period but expressed concern about a slowdown in the U.S. market in the second quarter.

## OMC posts 13% gain

Omnicom July 19 reported a 13.1% rise in second quarter net income to \$275 million on a 14.7% jump in revenues to \$3.5 billion.

Its Fleishman-Hillard, Porter Novelli and Ketchum-led PR operation grew 7.1% to \$311.7 million in Q2, outpaced by the \$1.6 billion advertising unit, which was up 18.5%, and the \$1.2 billion CRM operation, up 15.1%.

The PR division registered a 1.3% increase in organic growth for the latest quarter.

OMC CEO John Wren spent \$277 million for acquisitions during the first-half, \$44 million of that amount were "earn-outs." Synergy, London-based scientific communications shop, was the biggest pick-up for the quarter. It is now part of DDB Health.

For the first-half, OMC earned \$477 million (+17.3%) and recorded revenues of \$6.6 billion (+11.4%).

OMC's stock trades at \$48.43. Its 52-week range is between \$51.25 and \$34.68.

## IPG's PR units up 9.6% in Q2 growth

Interpublic July 28 reported a 31 percent rise in second quarter net income to \$108.9 million on an eight percent revenue rise to \$1.7 billion.

Solid overseas revenue growth of 15.7 percent to \$752.9 million fueled the ad/PR combine's performance.

Harris Diamond, who heads Weber Shandwick and chairs IPG's constituency management group, told O'Dwyer's that PR revenues advanced 9.6 percent for the quarter as clients spent to "build-out" their businesses.

He also noted that budgets for social

media programs are proving to be "additive" rather than "subtractive" to traditional PR offerings at WS, GolinHarris, Rogers & Cowan and DeVries PR.

Diamond said both PR and CRM turned in "terrific" performances.

IPG CEO Michael Roth noted that stepped up investment in people trimmed profit margin from 11 percent to 10 percent this year as salaries/related expenses rose 10.6 percent to \$1.1 billion. "Margin enhancement" is a priority for the balance of the year.

Roth noted that organic growth hit the 6.8 percent mark for the first-half. That puts IPG in line to hit its four to five percent full-year organic growth goal.

## Publicis sees U.S slowdown

Publicis July 21 reported a 2.7% rise in second quarter revenue to 1.4 billion euros (\$2 billion) as organic growth ticked up 7.6% amid a Q2 slowdown in the U.S. offset by developing countries.

North American revenue slid 5.9% to 639 million euros (\$917 million), although organic growth in the region was up 5.3%, buoyed by media growth and healthcare business.

"Second-quarter growth was very strong in virtually all countries and regions around the world despite a slowdown observed in the USA which was offset by growth in developing countries," said CEO Maurice Levy. "Despite a moderate slowdown in the second quarter, the USA achieved organic growth of 7.2% driven by solid media growth and the sizeable contribution of the healthcare sector."

Publicis said profit for the first half is up 8.5% over 2010 at 231 million euros. Organic growth for its PR operation rose five percent.

Levy noted the French conglomerate's first half was "rich in acquisitions" to fuel growth. Deals included digital consultancies Rosetta and Big Fuel, as well as China PR giant Genedigi.

"Clearly, in order to accelerate our profitable development, we will need to give priority to investment and to talent, particularly after two years of a salary and hiring freeze," he said.

## Vocus Q2 revenue jumps, loss narrows

Vocus reported a 20% increase in second quarter revenue to \$28.5 million compared with Q2 of 2010, as its net loss narrowed to \$755,000 from \$2 million a year earlier.

The company added 601 new PR software subscription customers during the period, a 30 percent increase from 435

added last year. It closed the quarter with 9,857 clients, putting the company on pace for the 10,000 mark in Q3.

CEO Rick Rudman, in a conference call discussing the Q2 earnings on July 26, categorized the quarter as "better than expected."

Rudman said Vocus plans to roll out a new version of its core service in Q3, integrating its PR offerings with marketing and social media. The "cloud-based" suite is expected to be offered to customers in Q4.

The company forecasts third quarter revenue in the \$28.6 million - \$28.8 million range.

## Cision Q2 revenue dips

Sweden-based PR software company Cision AB said second quarter organic growth climbed two percent in the U.S. but slid three percent overall as revenue dipped to SEK 242 million (\$38.3 million) from 285 million a year earlier.

Currency fluctuations hit Cision's revenue in Q2 to the negative effect of SEK 38 million, more than triple the effect of a year earlier. Eighty percent of the company's revenue is generated in foreign currency.

Hans Gieskes, CEO of the PR services company, said Q2 revenue fell mainly due to negative currency effect and to a lesser extent from negative organic growth and the impact from acquisitions and divestments.

Q2 was a quarter of "strong profitability" in North America, Gieskes said, citing the region's third straight quarter of organic growth, despite struggles at its media monitoring-dependent Canada operation, which is slated for a repositioning.

The U.S. is Cision's top market with 140.7 million in revenue in Q2, down from 162.7 million for the same period of 2010.

North American revenue overall slipped to 171 million from 203 million a year earlier. U.S. organic growth of two percent was down a notch from Q2 2010's 3% increase.

Gieskes said divesting its costly Monitor and Analyze business in Finland has improved margins in Europe and Cision reported improved margins and profit for the region.

Cision's European finance chief and managing director, Tosh Bruce-Morgan, was also named chief financial officer of the company, taking up the post in September. He is credited with a key role in turning around the European operation. Overall profit ticked down to SEK 30 million from 35 million for Q2 of 2010. ●

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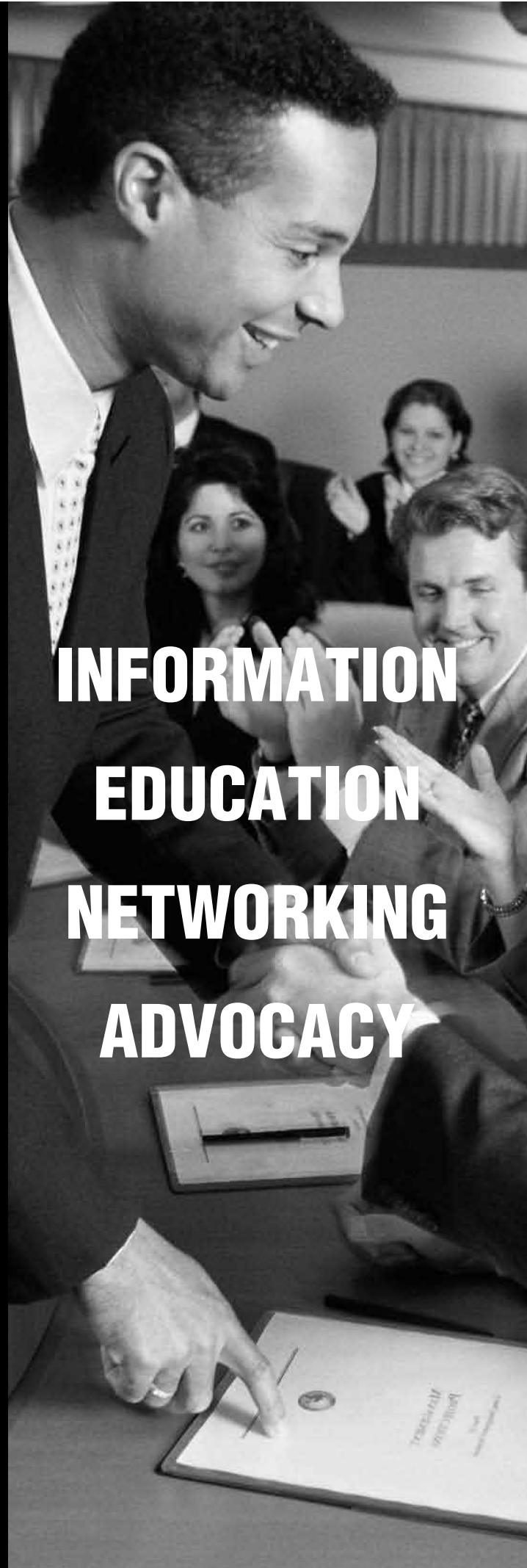
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# Social media increases financial PR's net worth

**Social media's diverse audiences and nimble platforms lend high worth to financial services firms. So why aren't more of them integrating social media strategies into their pre-existing communications plan?**

By Timothy Kane

**S**ure, kids and young adults continue to be the most enthusiastic social networkers. In terms of growth however, they're rapidly being overtaken by older Americans. Social networking among adults age 50-64 skyrocketed 88% last year, while it inched up only 13% among 18-to-29-year-olds.

And social media content? It's no longer just gossip, gadgets and gaming. Four out of five of the largest *Fortune* 500 firms use Twitter, Facebook, YouTube or corporate blogs to communicate with their customers and stakeholders. More than two-thirds of companies polled by McKinsey reported they have achieved measurable benefits from social technologies — including more

effective marketing, more innovative products and services, better access to knowledge, lower costs and higher revenues.

## Income and influence

According to a recent SEI survey, high net worth (HNW) individuals — people with more than \$5 million in investable assets — are more likely to be involved with social media. Thirty-eight percent have visited at least one social media site within the past 24 hours.

This inevitably gives rise to a host of questions. What are HNW individuals looking for? Where do they go to get it? And how do they ever find the time? Typically, affluent people are looking for information — available on a 24/7 basis — and they want the process to be quick and easy. In fact, 40% of HNW Internet users say they prefer social media to the phone.

Fifty percent of affluent users visit Facebook; 37% use YouTube; and slightly more than a third (35%) check in on LinkedIn.

More than a third (36%) of HNW investors report that they'd rather get information from their advisors via social media. And satisfaction with an advisor's online tools directly correlates with the amount of

assets affluent individuals are willing to invest.

## A social haven for finance

A majority (68%) of financial services firms now use social media, most often for new business prospecting, but also for communicating with existing clients.

Financial services firms are discovering the advantages that accrue to those who participate in the great global conversion fostered by social media. Nearly half (47%) of respondents in a recent Socialware survey of financial advisors credited social media for at least one lead. Thirty-six percent said they actually closed deals and acquired new clients as a result of social prospecting.

So why isn't social media an integral element in every financial services company's marketing mix today? Nearly half (47%) of advisors who use social media confess that regulatory and compliance issues are their single biggest worry.

Nearly a third (32%) work for firms that don't have a social networking policy — a direct violation of FINRA's recent guidance on social network usage.

And shockingly, two-thirds of firms are noncompliant with FINRA/SEC archiving guidelines. Only 12% archive their data with an automated system, according to the findings of a Socialware survey. Slightly more than one in five (22%) manually archive data through screenshots or copy-and-paste — which is not only time-consuming, but prone to error.

In truth, FINRA and the SEC are concerned with regulating social media, not banning it. They recognize that all social media content is not equal. Compliance requires an understanding of the nature of the particular content:

- Static content is the rough equivalent of advertising. Content that remains posted until changed by the firm or individual that originally created it (such as blogs and profiles) must be pre-reviewed.
- Interactive content is roughly equivalent to a public appearance. Content that's used for real-time communication (such as Tweets and blog comments) must be captured, retained and archived and should always be post-reviewed.

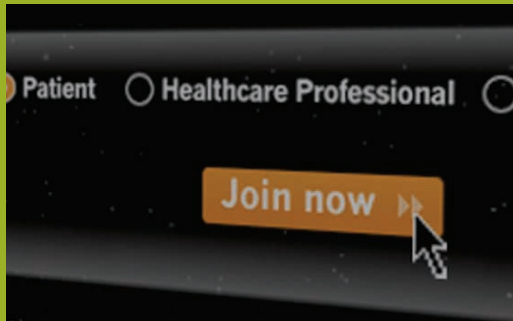
It's hard to get anybody to agree about almost anything these days, but a recent survey found something which 100% of financial firms agree: social media are here to stay. The opportunities are simply too compelling to be ignored.

*Timothy Kane is Executive Vice President of Digital at Makovsky + Company. ●*

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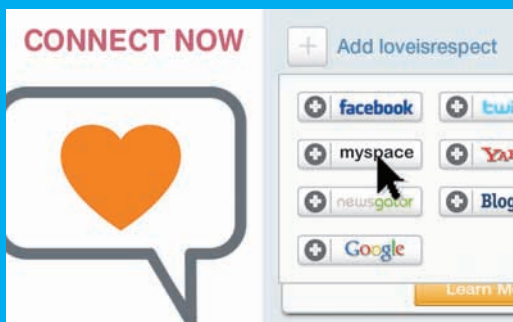
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# Media's thirst for financial news a benefit to PR

**Let's face it: the U.S. financial industry has an image problem. The good news? The media's hunger for scandal has sparked a demand to fill airtime with news of all things money. Leaders in the field are taking note, and are hiring PR counsel more than ever to cash in on a new media sensation.**

By Jon Gingerich

**P**R pros with clients in the financial sector seem to agree on one thing: business in 2011 is generally much better than last year. Of course, 2010 was also better than 2009 — simply because anything was better than 2009 — a year which will go down as the communications industry's Hindenburg, especially for PR pros with clients in the financial circuit.

Many experts confidently predict that 2012 should be the year the industry officially returns from skinny client rosters, paltry budgets and slashed staff. Now, many are saying next year could come in with a bang.

The reason? It isn't just that communications budgets for finance houses are on the upswing. Finance experts, once notoriously leery of the spotlight, now understand they need to integrate PR and marketing into

their daily business to win over a skeptical public. Moreover, the media and the public's newfound obsession with financial news has created a culture that is now focused — almost obsessed — with all news financial.

"The public is obsessed with financial news," said Richard Dukas, President and CEO of Dukas Public Relations. "The economy, the stock market and the housing market have been the dominant stories for the past three years. It's easier now to get top tier national coverage in the financial industry than any other industry. If you want to be on TV and you're not in finance it's going to be tough. Finance just offers more opportunities and more outlets, and I would challenge anyone to tell me otherwise."

## Crisis culture

So why the obsession? According to experts, part of it is due to the media's continuing appetite for crisis. We love to hate

the Bernie Madoffs of the world; the bailouts of 2008 forged a populist solidarity in our national conversation that still rattles on pundits' tongues today. Financial headlines have become a sort of highbrow reality TV.

"As a society, we still love drama and sensational news," said Dean Trevelino, Principal of Trevelino/Keller in Atlanta. "Financial news didn't stop two years ago. The financial services sector has stayed fairly true to their ability to deliver headlines. We continued to see fallout and Ponzi schemes all the time. We're a great society when it comes to recycling trends. We don't necessarily learn from what happens, we just learn how to get over our problems until they come back several years later. You see some of the profits going on in the industry now, they were ready to close their doors just several years ago and now they're making money again."

## Nuanced news cycle

Trevelino said the media's financial furor has also resulted in a news hour that is now interested in different types of financial stories it wouldn't touch several years ago.

"The media really likes covering credit unions, where before they didn't give them full attention or even understand them," he said. "We're becoming kind of a barometer, we're not only getting into stories about credit unions but we're able to tell stories about the industry. This environment has given us the opportunity to get news of other segments out there that historically would not been well covered several years ago."

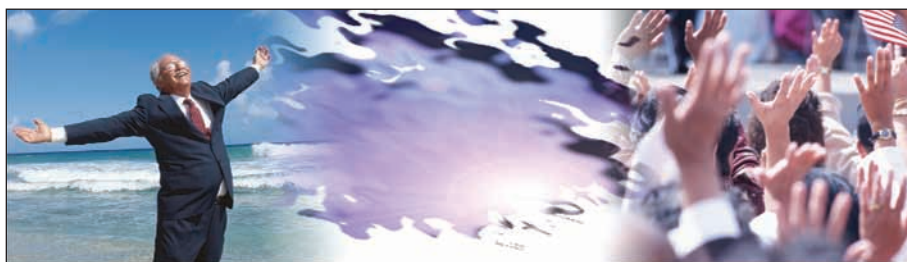
According to Dukas, this new demand now has many different types of investment houses reaching out for PR who were once notoriously mum on communications. Not



Richard Dukas



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only are more investment banks and service providers seeking communications counsel, but hedge funds, asset managers, mutual funds, wealth advisors and specialty finance companies are realizing a good communications plan isn't something they can afford not to have.

"There seems to be great appetite for PR, especially among asset management firms," Dukas said. "Asset managers of all stripes are more interesting in marketing, and more interested in PR. It's taken some time, and the hedge fund community is still by-and-large leery of engaging with the media, but it's no longer a blanket rule. Around the margins, we're seeing more interest in engaging with PR. I would call it a shift, but there is a gradual, growing recognition that marketing is must."



Henry Feintuch

Experts also said the evolution of Bloomberg, MSNBC, and e-trade capabilities have raised a culture of savvy consumers, driving the need for a news cycle rife with investor headlines.

As consumers' investment habits have matured, the appetite for more information in this arena has proportionately increased.

"You can't dodge the fact that so many people are now more empowered and self-directed in their investment habits," said Henry Feintuch, President of Feintuch Communications. "They're closely monitoring the stock market every day, and they understand that what happens in China impacts their 401Ks. It's created this pop culture phenomenon where everything's a level playing field and everyone's a player. If your appetite is for finance, you have many choices."

#### PR responds

It appears, by all indications, that people and institutions are investing again. Concurrently, there also appears to be a noted demand for PR services from a community that was formerly reluctant to embrace it. Feintuch said the media's obsession with financial news now gives clients a unique opportunity to tell their story, be it in good times or bad.

Feintuch relayed an incident in July when the SEC came out with a warning to consumers about the dangers of foreign exchange trading. Feintuch said his clients came up with a statement explaining their point of view, which both endorsed transparency in the industry and the need to create more tools for the consumer to manage their foreign exchange portfolio.

"You need to focus on what type of communication you're going to go with.

If the media and public are more cynical it means you need to get out there and talk issues. Clients and communications need to be more transparent, they shouldn't always try to put on a pretty face," Feintuch said. "There's this inclination that when there's bad news you should avoid the limelight, but when you're a player in the industry you have to manage your brand consistently, you have to do it through good and bad news cycles. You have an obligation to continue to communicate. The tonality may change, the sweet, good news may not be appropriate at times, but I believe the obligation to tell their story is out there."

"For us it's still the basic premise, we're

not doing anything different today that we were doing in 2008," Dukas said. "We tell our clients that it's important to always maintain a dialogue with clients and prospects, in good times and bad. And I think the ones that make the decision to hire a PR firm understand that. Our clients want to be involved in the dialogue and demonstrate their views and discuss the overall climate and discuss issues and trends. For them, it's a good place to be, it enables them to position their brands as leaders. If you're going on the news and discussing the market, if you're showing out your head it shows a sense of conviction. It shows that you're not hiding in a foxhole." ●

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Feintuch Communications' client, Glenn Stevens, CEO, GAIN Capital (left), being interviewed at the NYSE on Dec. 15, 2010 as the company's shares began trading.

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DPR is an award-winning media relations-focused firm specializing in financial and professional services. One of the fastest growing firms in the industry over the past five years, DPR has earned a spot on the *Inc.* magazine prestigious list of the 5,000 fastest growing private companies three years in a row, from 2008-10. DPR's clients include well-known and emerging hedge funds, mutual funds, institutional investors and wealth advisors; real estate firms and mortgage providers; investment banks; accounting and law firms; and emerging technology companies. DPR is regarded for its ability to generate consistent high-end coverage for its clients in top-tier media, including *The Wall Street Journal*, *New York Times*, *Barron's*, *Financial Times*, *CNBC*, *Bloomberg* and all of the top trade media, websites and

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**Carol Merry**, Senior VP, IR

Telling a compelling investment story — that's what we focus on at Fahlgren Mortine. We've worked with public companies ranking in size from micro-cap to *Fortune* 500, and in

diverse industries from advanced materials to real estate. We provide a full scope of IR services, including perception research, financial communications and media relations, and strategic counsel.

Our dedicated IR team has client-side and agency-side experience through varied market conditions and special situations such as M&As, IPOs, management transitions, restructurings, shareholder activism and Chapter 11 filings. We get along with lawyers, accountants and the other professionals involved in corporate governance issues.

With offices in Columbus, Cleveland, Dayton, Cincinnati, Toledo, Charleston, Parkersburg and Fort Lauderdale, we can integrate a full range of communications services, including crisis communications, reputation management, social media and design. We have produced hundreds of printed and web-based annual reports, fact sheets and presentations for clients around the country.

## FEINTUCH COMMUNICATIONS

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www.ecpglobal.com

**Henry Feintuch**, President

Feintuch Communications is a strategic relations firm with decades of experience in providing integrated financial communications services both to companies seeking to go public as well as those already publicly held.

In collaboration with several best of breed investor relations firms, we create holistic programs that address the broad range of public company needs. Core investor relations services include corporate positioning, institutional and sell-side targeting, IPO consulting and road shows, conference call preparation, shareholder letters, M&A advice, speaking platforms and

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We offer our clients “integrated thinking” when it comes to developing and implementing street-smart campaigns. Feintuch Communications is a member of ECP Global, an international alliance of premier independent communication consultancies which are particularly adept at coordinating financial/IR projects and programs.

## GRAYLING

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Grayling is the world's second largest independent Public Relations, Investor Relations, Public Affairs and Events consultancy with specialist services including CSR, environment, sustainability and digital.

We live in an era of unparalleled change. Economic, financial, political and technological developments are happening at a breathtaking pace. There has never been a greater need for a strategic advisory firm which can stay one step ahead: spotting trends before they happen, predicting market fluctuations, identifying risks and opportunities as well as putting emerging technologies to work. This requires a different kind of thinking for a different kind of world. Grayling's international reach delivers fully integrated communications across every major market; our local presence allows us to create bespoke and effective programs. Grayling has 900 staff



in 70 offices in 40 countries across the U.S., Western and Eastern Europe, Africa, Middle East and the Asia Pacific region, highlighting our ability to provide clients access to key influencers and money centers around the world.

We challenge conventional thinking to deliver stand-out campaigns that shift attitudes and change behavior. In the global capital markets, Grayling assists private and publicly traded companies with integrated communications services with deep expertise in local market and cross border initial public offerings. In an ever-changing world, results matter and our planning and evaluation functions ensure we hit the mark and generate a genuine return on investment for our clients.

## HOPE-BECKHAM INC.

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www.hopebeckham.com

**David C. Van Voorhis**, *Director,  
Business Development & Client  
Relations*

Hope-Beckham is committed to being your best resource for public relations, marketing communications and experiential marketing services — responding quicker, working faster and smarter, and providing the best possible value.

We are dedicated to being flexible and cooperative. There is no single best way to market a company, product or service, but a variety of creative and savvy options, and we strive to consider them all.

Hope-Beckham believes it is the knowledge of the variety of options available and our ability to effectively implement those options that achieves the best results.

Whether communicating with a client's various constituencies or creating programs and events that effectively position an organization within the areas it serves, Hope-Beckham is known for its creativity and cost effectiveness.

The September issue of *O'Dwyer's* will profile PR firms that specialize in beauty and fashion. If you would like your firm to be listed, contact Editor Jon Gingerich at 646/843-2080 or jon@odwyerpr.com

## ICR

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**Thomas M. Ryan**, *CEO, Co-  
Founder*  
**Don Duffy**, *President*

ICR is a privately owned, 100 employee, strategic communications firm specializing in investor and media relations, corporate communications, crisis management, and digital media. The firm, headquartered in Connecticut with offices in New York, Boston, Los Angeles, San Francisco and Beijing, was ranked by *O'Dwyer's* as the largest independent financial communications firm in the nation in 2010.

With approximately 300 clients, ICR offers senior counsel in more than 20 industry verticals, and its competitive advantage comes from senior-level capital-markets experience, deep industry knowledge, and more than a decade of communications experience. Client service stresses an integrated approach where teams of former Wall Street and corporate veterans, including senior sell-side analysts, portfolio managers, and investment bankers combine with senior PR, media and corporate communications professionals to provide a unique level of advisory.

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www.joelefrank.com

**Joelle Frank**, *Managing Partner*

Joelle Frank, Wilkinson Brimmer Katcher is widely regarded as one of the premier financial and corporate communications firms in the industry, providing strategic counsel for public and private companies in the areas of Corporate Communications, Investor Relations, Transaction Communications and Crisis Communications.

Our Investor Relations practice helps publicly-traded companies communicate clearly and effectively with professional fund and port-

folio managers, securities analysts, and the individuals who buy, sell and/or recommend securities.

Our Transaction Communications practice assists companies with communications for friendly acquisitions and mergers, unsolicited acquisition proposals, tender offers and proxy contests, as well as initial public offerings (IPOs) and spin-offs.

## MAKOVSKY + COMPANY

16 East 34th Street  
New York, NY 10016  
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Fax: 212/751-9710  
www.makovsky.com

Makovsky + Company, founded 30 years ago, has become one of the nation's leading independent global public relations, investor relations and branding / interactive consultancies by adhering to its original vision: that specialization in key areas is the best way to build reputation, sales and fair valuation for the client. Our competitive edge is reflected in our brand energy line: "The Power of Specialized Thinking."

Headquartered in New York, Makovsky has agency partners in more than 27 countries and in 37 US cities through IPREX, the second largest worldwide corporation of independent agencies, of which it is a founder. Named to the 2010 *Inc.* 5000 list of America's fastest growing companies, Makovsky was also just named "2010 Midsize PR Agency of the Year" by the Bulldog Awards and "Multispecialist Agency of the Year" by the *Holmes Report*. Ken Makovsky just won the Stevie Award as "PR Executive of the Year." Other accolades include a full complement of Silver Anvils, Sabre Awards, IABC Awards, Creativity in Public Relations Awards, Big Apples and recognition by leading industry trade publications as one of the nation's leading B-2-B communication firms.

Makovsky + Company internal values — innovation, initiation, communication, collaboration, motivation and education — are about ensuring external value and realizing the firm's mission: smart people working in harmony to help our clients and the agency win. With a history of financial services clients in every major sector — from asset management and banking to credit cards, insurance and



ICR CEO and Co-Founder Tom Ryan.

benefits consulting — Makovsky + Company has distinguished itself in an area where few of its peers have gained a foothold. Our professional staff brings the necessary experience, sophistication and creativity to this complicated and demanding environment. Our experience is so deep, in fact, that financial services technology providers in the areas of risk management, trust administration and securities trading retain us to handle their communications needs.

## MARKETWIRE

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Marketwire advances the way the world communicates by electronically delivering news and information to traditional, new and social media audiences, including newspapers, magazines, databases, analyst terminals, online portals, blogs, and more. Marketwire maximizes the power of its clients' communications by leveraging the latest in search engine optimization, multimedia, social media, monitoring and new technologies. Sysomos, a Marketwire company, provides unparalleled business intelligence for social media through advanced monitoring and analytics.

Serving more than 12,000 clients worldwide through 20 offices on four continents, Marketwire is a dominant distributor of company news releases and other communications. Marketwire is majority-owned by OMERS

Continued on page 24



## MARKETWIRE

Continued from page 23

Private Equity, which manages the private equity activities of OMERS Administration Corporation and today has \$5.5 billion of investments under management. The group's investment strategy includes the active ownership of businesses in North America and Europe. OMERS Private Equity is headquartered in Toronto, Canada, with offices in New York and London. For further information visit: [www.omerspe.com](http://www.omerspe.com). For more information, visit us online at [www.marketwire.com](http://www.marketwire.com) and the Channel M blog ([blog.marketwire.com](http://blog.marketwire.com)), or on Twitter @marketwire.

## MWW GROUP

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**Michael Kempner**, *President / CEO*  
**Kathy Fieweger**, *Executive Vice President and General Manager*

MWW Group provides strategic counsel and integrated corporate and financial communications programs for both publicly traded and privately held companies across a multitude of situations and sectors. From merger communications to initial public offerings, restructurings to M&As, MWW Group has a proven track record implementing strategic communications campaigns that support business objectives and are responsive to the unique needs of internal and external stakeholders. Our success is predicated on the experience of senior level counselors and proprietary methodologies that leverage the nexus of financial communications and investor relations, reputation management, influencer relations and crisis and employee communications to ensure continued productivity, stock performance and customer/brand loyalty through often volatile and uncertain circumstances.

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solutions

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Expanding upon NASDAQ OMX's unrivaled, transformative trading technology, NASDAQ OMX Corporate Solutions powers global business communications. From investor relations, to corporate communications, to governance, NASDAQ OMX is the first and only exchange dedicated to owning and operating Corporate Solutions that help public and private companies worldwide minimize risk, maximize efficiency, and increase transparency.

## NATIONAL INVESTOR RELATIONS INSTITUTE

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**Matt Brusch**, *Vice President, Communication*

Founded in 1969, NIRI is the professional association of corporate officers and investor relations consultants responsible for communication among corporate management, shareholders, securities analysts and other financial community constituents. The largest professional investor relations association in the world, NIRI's more than 3,500 members represent 2,000 publicly held companies and \$5.4 trillion in stock market capitalization. Membership in NIRI entitles the investor relations professional to a wide range of benefits such as educational programs, publications and networking. For more information about the "graduate school" of investor relations, please contact NIRI's communication department at 703/506-3570, or visit [www.niri.org](http://www.niri.org).

## OGILVY PUBLIC RELATIONS WORLDWIDE

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**Thomas Smith**, *Executive Vice President, Corporate Practice*

The Ogilvy Public Relations financial communications and investor relations team brings a deep and diverse experience in capital markets (IR, M&A, IPOs), corporate communications, journalism and academia. Our team of skilled professionals supports clients day-to-day with all phases of their communications efforts — whether they're speaking with shareholders, media or employees. Our team's approach is comprehensive — a 360-degree mindset with the business / communications rationale being that all external and internal audiences are interconnected and can help shape Wall Street perceptions. Investor relations is an element of that 360 approach.

From a pure investor relations perspective, we're experts in capturing insight from important investment decision makers and influencers in order to convey our clients' stories and messages. Our strategy and approach working with our investor relations clients is to develop and implement a financial communications program. Ogilvy PR helps its clients shape perceptions so they accurately reflect a company's performance, corporate reputation, goals and strategies. As a result, we become trusted advisors for our clients as experts of their business, industries and the capital market dynamics that impact a company's valuation in the marketplace.

## RF | BINDER PARTNERS

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**Amy Binder**, *CEO*  
**Robert D. Ferris**, *Executive Managing Director; Chair, Capital Markets Practice*

RF|Binder is a full-service public relations agency headquartered in New York with offices and bureaus in Boston, Chicago, Philadelphia, Los Angeles, Miami and Washington, D.C. We serve clients wherever the interests of customers, investors and the public intersect. That includes industries such as financial services; lifestyle and healthy living; technology; food and nutrition; education; and energy and the environment.

At RF|Binder, we help clients

achieve their goals by using information and communications to build awareness, third-party support and positive word of mouth among the people most important to our clients. We know the stakeholders — investors, consumers, customers, media, non-governmental organizations, public officials, employees and academics — and how their collective opinions and beliefs shape a company's reputation, influence valuation and affect its business goals. RF|Binder applies this knowledge to help organizations engage the critical influencers on Wall Street, Main Street and inside the Beltway.

RF|Binder's capital markets team provides counsel and services that help clients succeed in the global competition for capital. We work with public and pre-IPO companies to cultivate broadly based recognition of their performance and prospects among key market audiences, fostering full and fair valuations and, ultimately, lowering the cost of capital. We work with non-public companies and organizations whose communication challenges require an in-depth understanding of capital markets. Our capabilities include counsel on financial transactions and corporate positioning, investor outreach, financial media relations and crisis and issues management.

## ROOP & CO.

925 Euclid Avenue  
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**Jim Roop**, *President*  
**Brad Kostka**, *Senior VP*

Roop & Co. is a high-end, high-value communication consultancy, providing public relations, investor relations and graphic design services. Financial relations clients include public companies, private equity firms, family offices, investment advisors and banks.

Financial relations services include research; event and presentation planning; website design; annual report preparation; specialized financial collateral design; financial advertising; and counsel on mergers, acquisitions, divestitures and IPOs.

Financial clients include Cambridge Capital, Chess Financial, CM Wealth Management, Fairport Asset Management, Key Bank, Kirtland Capital Partners, RPM International Inc. and Vantage Financial Group.



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**George Sard, Chairman & CEO**  
**Paul Verbinnen, President**

Sard Verbinnen & Co is a leading strategic corporate and financial communications firm with offices in New York, Chicago, San Francisco and Los Angeles. We provide communications counsel and services to clients including multinational corporations, smaller public and private companies, investment firms, financial and professional service firms, and high-profile individuals.

The firm's highly experienced senior professionals provide sound, objective advice and execution support to clients across a broad spectrum of industries. Our work encompasses corporate positioning, media relations and investor relations, transaction communications, litigation support, crisis communications, and other special situations.

Founded in 1992, our firm is recognized for delivering candid and thoughtful strategic advice, excellent written product and tactical execution, and tireless advocacy on behalf of our clients. Our senior professionals are actively engaged in both counsel and implementation. Their diverse backgrounds and expertise, unparalleled relationships and credibility with the media, and deep understanding of the investment community drive the firm's ability to help our clients manage complex situations and communicate to multiple constituencies successfully.

## SLOANE & COMPANY

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**Elliot Sloane, CEO**  
**John Hartz, Whit Clay, Darren Brandt and Josh Hochberg,**  
*Managing Directors*

Sloane & Company is an industry-leading strategic communications firm specializing in corporate and financial public relations, investor relations, transaction support, public affairs, crisis and litigation support. Differentiating us

from the crowd, the key to the firm's success is bringing a fluid and experienced capital markets orientation to all our assignments.

Over the past ten years, the firm has earned a reputation for providing strategic counsel to "C" level executives of *Fortune* 500 public companies, as well as large and mid-sized private businesses and associations. Our clients include leading consumer products, pharmaceutical, technology and financial companies.

Sloane & Company provides expertise to clients across a wide range of industries in crafting their communications strategies. The firm's diverse portfolio inspires our professionals to think outside of the traditional bounds to reach clients' key constituencies including customers, employees, investors, global and local opinion leaders, industry experts and political decision makers.

Our professionals understand and recognize the impact that media coverage has on a client's valuation and reputation, particularly as it relates to key issues in national, state and local governments. Sloane & Company's public relations programs are effective because they begin with a complete understanding of each client's business fundamentals and future goals. Every decision is tied to these strategic objectives, helping our clients shape their core positioning in the marketplace while aggressively and creatively pushing that positioning through global, national and regional media outlets.

## SNL IR SOLUTIONS

www.snl.com/irsolutions

**Mike O'Connell, Director**

SNL IR Solutions builds and manages IR Web sites for companies in various industries across the market cap spectrum, from multi-billion-dollar financial institutions and REITs to small community banks — and everywhere in between.

SNL builds free trial sites for new customers and redesigns existing sites free of charge for current clients. We provide a custom design that mirrors your brand image and matches your corporate site. We then integrate your IR site with our all-in-one solution with features such as an advanced IR Console for Website management, free redesigns, a mobile-friendly platform and exceptional client support.

Through industry leading partners, SNL also offers a full suite of

ancillary services including Conference Calls, Webcasts, Press Release distribution and Edgar Filings.

## TREVELINO / KELLER

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**Dean Trevelino, Genna Keller,**  
*Principals*

Trevelino/Keller, one of the 30 best firms to work for in North America, delivers an integrated communications strategy of public relations, social marketing and brand communications for public and private companies. Its depth within financial services includes existing and emerging segments such as traditional banks and credit unions, business cash advance providers, mobile banking companies, loyalty marketing firms, venture capital, private equity, biopayments, payment processors, e-commerce providers, retailers and other first movers. Founded in 2003, the firm has worked with companies such as Capital Access Network, AdvanceMe, NewLogic, Paymetrics, BioPay, Delta Community Credit Union, Vesdia and others aligned in some way with the financial services segment.

More information can be found at [trevelinokeller.com](http://trevelinokeller.com).

## WALEK & ASSOCIATES

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**Thomas Walek, President**  
**Armel Leslie, Principal**  
**Mary Beth Kissane, Principal**

Walek & Associates is one of the largest and fastest-growing independent, global financial and corporate public relations firms. Founded in 1998 in New York and in 2008 in Hong Kong, Walek specializes in public relations and investor relations in capital markets, asset man-

agement, hedge funds, private equity, professional and financial services, information and financial technology, and public companies in all sectors. From building visibility and brand to financial PR, financial transactions, product and service launches, and managing crises, Walek delivers results that help clients build business. Walek & Associates has received numerous awards, including the 2011 Hedgeweek award for Best PR firm, and numerous awards from The National Investor Relations Institute.

## WEBER SHANDWICK

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**Paul Jensen, Chairman, North American Corporate Practice**  
**Jim Donaldson, Exec. VP,**  
*Corporate Comms. EMEA*

Weber Shandwick's Financial Communications practice combines the market-specific expertise, experience and strategic financial communications and investor relations skills of a specialist firm, with the resources and international reach of a full-service global agency.

As experts in communications relating to international flows of capital, from initial public offerings to mergers and acquisitions, spin-offs or demergers, bankruptcies and restructurings to quarterly earnings outreach, Weber Shandwick counsels listed and privately-held companies and organizations on a global basis, advising on some of the largest and most complex transactions in recent years.

We work closely with clients and their advisors to ensure consistent targeted outreach to key stakeholders including investors, analysts, employees, customers and journalists to support effective communication of important financial activities both locally and globally. Established relationships with key financial, business and industry media and investment community influencers and real-time local market intelligence in leading financial centers allows Weber Shandwick to identify and mobilize advocates in support of its clients' business objectives. ●



# O'DWYER'S RANKINGS

## TOP INVESTOR RELATIONS & FINANCIAL PR FIRMS

<b>1.</b> ICR	Norwalk, CT	<b>\$24,994,066</b>	<b>25.</b> CooperKatz & Co.	New York	<b>553,590</b>
<b>2.</b> Edelman	New York	<b>24,465,150</b>	<b>26.</b> Linhart PR	Denver	<b>423,757</b>
<b>3.</b> APCO Worldwide	Wash., D.C.	<b>11,340,000</b>	<b>27.</b> Jackson Spalding	Atlanta	<b>414,363</b>
<b>4.</b> Ruder Finn	New York	<b>6,750,000</b>	<b>28.</b> Boardroom Comms.	Plantation, FL	<b>350,000</b>
<b>5.</b> CJP Comms.	New York	<b>6,744,428</b>	<b>29.</b> Maccabee Group	Minneapolis	<b>315,775</b>
<b>6.</b> Intermarket Comms.	New York	<b>3,929,978</b>	<b>30.</b> Ron Sachs Comms.	Tallahassee	<b>305,595</b>
<b>7.</b> Makovsky & Co.	New York	<b>3,700,000</b>	<b>31.</b> Trevelino/Keller Comms.	Atlanta	<b>300,000</b>
<b>8.</b> RF   Binder Partners	New York	<b>3,500,000</b>	<b>32.</b> Zeno Group	New York	<b>298,935</b>
<b>9.</b> Padilla Speer Beardsley	Minneapolis	<b>2,364,207</b>	<b>33.</b> Casey Comms.	St. Louis	<b>233,349</b>
<b>10.</b> BlissPR	New York	<b>2,354,000</b>	<b>34.</b> Godwin Advertising	Jackson, MS	<b>200,670</b>
<b>11.</b> Atomic Public Relations	San Francisco	<b>2,200,000</b>	<b>35.</b> French   West   Vaughan	Raleigh	<b>189,221</b>
<b>12.</b> Gregory FCA	Ardmore, PA	<b>2,100,000</b>	<b>36.</b> Landis Comms.	San Francisco	<b>178,096</b>
<b>13.</b> Seigenthaler PR	Nashville	<b>1,753,503</b>	<b>37.</b> McNeely Pigott & Fox	Nashville	<b>175,011</b>
<b>14.</b> Dukas Public Relations	New York	<b>1,700,000</b>	<b>38.</b> Saxum	Oklahoma City	<b>167,845</b>
<b>15.</b> Lambert, Edwards & Assocs.	Grand Rapids, MI	<b>1,671,580</b>	<b>39.</b> Zeppos & Assocs.	Milwaukee	<b>161,230</b>
<b>16.</b> Middleberg Comms.	New York	<b>1,400,000</b>	<b>40.</b> TransMedia Group	Boca Raton	<b>150,000</b>
<b>17.</b> Qorvis Comms.	Wash., D.C.	<b>1,331,795</b>	<b>41.</b> Kohnstamm Comms.	St. Paul	<b>120,540</b>
<b>18.</b> Peppercom	New York	<b>1,137,319</b>	<b>42.</b> Standing Partnership	St. Louis	<b>109,517</b>
<b>19.</b> Travers, Collins & Co.	Buffalo	<b>1,104,190</b>	<b>43.</b> Rosica Public Relations	Paramus, NJ	<b>103,506</b>
<b>20.</b> Regan Comms. Group	Boston	<b>1,037,400</b>	<b>44.</b> Allison & Partners	San Francisco	<b>100,000</b>
<b>21.</b> Black Twig Comms.	Wash., D.C.	<b>1,021,000</b>	<b>45.</b> Feintuch Comms.	New York	<b>82,743</b>
<b>22.</b> Levick Strategic Comms.	Wash., D.C.	<b>1,011,505</b>	<b>46.</b> Dawson + Murray + Teague	Dallas	<b>64,847</b>
<b>23.</b> Lane PR	Portland, OR	<b>822,858</b>	<b>47.</b> Schneider Assocs.	Boston	<b>63,900</b>
<b>24.</b> Rasky Baerlein Strat Comms.	Buffalo	<b>631,108</b>	<b>48.</b> Public Comms. Inc.	Chicago	<b>24,566</b>



# Budget woes, layoffs cast cloud over prof services sector

**Looming cuts in federal and local government spending, Wall Street layoffs and a lagging commercial real estate sector will pressure the professional services sector for the remainder of 2011, according to top PR executives with clients in that category.**

By Kevin McCauley

**G**oldman Sachs, Morgan Stanley, Barclays Capital, UBS and Credit Suisse have announced plans to lay off thousands of workers in the financial services category, a vital market for PR firms active in the consulting, accounting, recruiting, education and personal services areas.

Moody's, on July 25, reported only a modest uptick in the commercial real estate market. The rating service gave that market a first-quarter score of 67 out of 100. That two point improvement provided little cheer to PR firms that handle real estate, architecture, construction, interior design and retail clients.

Edelman, by far, is the biggest firm serving the professional services category. It enjoyed a 38 percent increase in 2010 fees to \$38 million.

Qorvis Communications took the second spot, registering fees of \$10.5 million. The Washington, D.C.-headquartered firm did not provide fee information in 2009.

Widmeyer Communications (\$5.4 million), APCO Worldwide (\$4.5 million), MWW Group (\$4.2 million), Hager Sharp (\$4.1 million), Schwartz Communications (\$4 million), Capstrat (\$4 million), Peppercom (\$2.9 million) and Beckerman (\$2.8 million) are the other Top 10 professional services roster.

## Down to 'need to haves'

Michael Robinson, Senior VP at Levick Communications in Washington, D.C., said "professional services firms that were devastated by budget cuts and diminishing client needs have largely eliminated their 'nice to haves' in their budgets, and then decisively pared down their 'need to haves' until their revenue once again makes this expense possible."

With continued economic gyrations ahead, Robinson expects PR for professional services firms to "continue episodically and mainly as individual projects."

He sees bright spots outside traditional banking and finance centers among companies that have embraced market-

ing communications.

"They have successfully positioned themselves as untainted by the taint that spread over Wall Street and Washington, thereby emerging as viable for candidates for board of director-led investigations, special situation litigation and other areas to which they previously would not have access to."

Levick registered \$1.7 million in professional services fees last year, down 26 percent from 2009.

## Cautious, but not hunkering down

Liz Hamner, Group Supervisor for Capstrat's professional services practice, says clients are cautious, "but that doesn't mean they are hunkering down and standing still." Though large projects and retainers are less prominent, there are "plenty of projects to be done."

There's a pick-up in mergers and acquisitions activity and joint ventures to navigate, according to Hamner, who has worked on business with Deloitte, CESI Debt Solutions and AICPA Academic.

Clients "are more open and interested in lower cost options, such as online tradeshows and social media campaigns."

She sees a silver lining in the economic downturn. "Many companies are doing more with less, and that means fewer people, which opens the door for our team to provide much-needed support."

## Chasing the 'vertical trades'

Patricia Thorpe, Senior Counselor at rbb PR, said the Florida firm is "pursuing 'vertical trades' because they generate the most new business leads for clients."

rbb encourages clients to write bylined articles for trade publications so the PR firm can "obtain for them incremental visibility by utilizing the reprints or website links to enhance their own personal brand and share with current and prospective clients."

Thorpe is helping clients incorporate social media into their marketing activities, especially online networking platforms such as LinkedIn and Facebook.

"By actively providing training and strategic counsel to guide them in effec-

tively utilizing these platforms, we help them drive new business while expanding their sphere of influence and expertise," noted Thorpe.

rbb is No. 18 on the professional services list with fees of \$1.8 million, up from \$740K in '09.

## Firms on a roll

Scott Widmeyer's firm enjoyed a 17.4 rise in professional fees to \$5.4 million, powered by clients picked up both this year and last.

"Nearly all of the clients that led our growth in 2010 are with us again this year, and most are at higher levels," he said. They are positioning in areas like energy independence, educational innovation, publishing and debt/deficit.

"We like that vote of confidence when clients return year after year and give us the opportunity to provide a high level of 'independent thinking,' which is first and foremost the Widmeyer brand," he said.

Keith Zakheim, CEO of Beckerman, says his firm has picked up professional services clients such as ABS Partners, Avidan Management,

Continued on next page



Michael Robinson,  
SVP of Levick  
Communications.



Liz Hamner, Group  
Supervisor of  
Capstrat's  
Professional  
Services practice.



Patricia Thorpe, rbb  
PR Senior Counselor.



Keith Zakheim, CEO  
of Beckerman.



**Sharron Silvers,**  
Managing Director  
of KCSA's prof.  
services shop.

Potomac Realty Trust, ING Real Estate and Hollister Construction Services.

"As the national real estate market begins to emerge from one of the most challenging cycles in recent history, owners and developers are looking to Beckerman and its 20-year track record in the industry as a key partner to further their business goals,"

Zakheim said.

#### **KCSA launches PS practice**

Jeff Corbin, CEO of KCSA Strategic Communications, established the firm's professional services capabilities as a formal practice area last month. He made the move to forge a higher profile in the market.

Sharron Silvers, a 12-year PR veteran, took on the role as Managing Director for the financial and professional services group.

She oversees clients like Merrill DataSite, WisdomTree, Needham, JMP Securities, American Stock Exchange, Mesirow Financial and Forefront Advisory.

When asked about the timing of establishing a practice during a period of market weakness, Corbin said KSCA is positioning for the rebound and added: "I love being a contrarian." ●

## **DARPA plans social media comms. research**

By Greg Hazley

**T**he Department of Defense's R&D agency has committed \$42M to fund social media research projects geared toward strategic communications as it sees current analysis tools to be too "dependent on chance."

The Defense Advanced Research Projects Agency, known as DARPA, is known for its key contributions to the creation of the Internet as well as advanced weapons and vehicle systems, said in an agency announcement July 14 that the spread of blogs, social networking sites and media sharing technology like YouTube provides an opportunity for armed forces to better understand the environment in which they operate.

"Events of strategic as well as tactical importance to our Armed Forces are increasingly taking place in social media space," reads the DARPA document on the planned program. "The tools we have today for awareness and defense in the social media space are heavily dependent on chance."

DARPA is soliciting technical pro-

posals for the SM research through August 30. It outlines four goals for the program:

1. Detect, classify, measure and track the (a) formation, development and spread of ideas and concepts (memes), and (b) purposeful or deceptive messaging and misinformation.

2. Recognize persuasion campaign structures and influence operations across social media sites and communities.

3. Identify participants and intent, and measure effects of persuasion campaigns.

4. Counter messaging of detected adversary influence operations.

The DARPA document gives an example of online rumors about the location of a "certain individual" which spread through social media and raised calls for the military to storm the rumored location. "By chance, responsible authorities were monitoring the social media, detected the crisis building, and sent out effective messaging to dispel the rumors and averted a physical attack on the rumored location," according the DARPA assessment. ●

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# Using LinkedIn to power professional services clients

**Until recently, the professional community has been reluctant to embrace social media. If there's one platform that professional services firms simply must consider as a means of building awareness for your clients' professional services brand, products and services — it's LinkedIn.**

**By Adam Bickelman**

I know what you're thinking: The site my employees use for job searching? The site my sales team uses for prospect research? Hasn't that been around for years?

LinkedIn happens to be the tool I've used for several of our firm's professional services clients to increase search engine optimization, raise brand awareness and generate website traffic and inquiries. It all began with a simple question: What could my clients and their employees do as brand ambassadors in just 15 minutes a week?

## **Creating brand ambassadors**

Whether you're a financial services company, law firm, commercial real estate organization, insurance company or any other professional services company, you most likely have a unique area of expertise or thought leadership, as well as a good story to tell.

The key to leveraging thought leadership and a company story through LinkedIn lies in the existing networks you, your company or your employees have built, as well as the networks you have yet to explore. There are likely many people interested in this intellectual property; it creates an opportunity for you to develop a LinkedIn Group focused on a specific topic or area of expertise, where all of the content that you own, create, publish or are featured in (press, industry reviews) can be posted, discussed and shared. Once your group is created, you'll need to build a communications program around it to make sure you are leveraging it effectively.

## **Engagement is clicks away**

Consider the size of your own network, and then multiply that by the number of employees and professional partners you have. This is your current "reach" on LinkedIn, which can grow organically over time through a focused communications program. Imagine if the only directive in your communications plan were to ask each employee and partner to share the official news and updates that you post to your LinkedIn Group each week. This alone means you'd be sharing relevant information and gaining meaningful brand impressions among the entire reach of your company's full network. In a company of 100 people with 100 contacts each, that's a

reach of 10,000.

Types of content updates can include press clippings, surveys, discussion topics, industry news and insights, thought leadership, exclusive intellectual property — anything you believe will be topical, relevant and interesting to your LinkedIn Group members.

While this is one way you can engage audiences via LinkedIn, there are many other ways to build, manage and activate your community through discussions, direct outreach and group affiliations — and this doesn't even account for activity on blogs, Twitter or Facebook — thereby expanding the scope of what your brand ambassadorship program can accomplish.

An example of a LinkedIn strategy in action comes from one of the most prestigious and well-known business schools in the world, the MIT Sloan School of Management. MIT Sloan recently launched its first program for working executives (the MIT Executive MBA). The program is uniquely structured to support highly successful mid-career professionals who seek to learn while they work. The program's administrators charged the Schneider team with developing a campaign that would build brand awareness for its innovative program and increase enrollment.

As a cornerstone campaign to complement our proactive media outreach, we created and managed an official LinkedIn Group, which continues to serve as a discussion forum for current and prospective students. We used MIT's LinkedIn Group to share a variety of interesting content regarding management education as well as media coverage secured throughout the public relations program. As of July, MIT's LinkedIn Group attracted more than 300 members, generated hundreds of comments and "likes," and facilitated noteworthy engagement among members of the inaugural class, program administrators and prospective students. The EMBA's LinkedIn Group ultimately served as the single biggest driver of inbound traffic to MIT Sloan's webpage during the admissions cycle. Partly as a result of our efforts, applications for the program's second class have increased substantially.

Another example of LinkedIn driving

increased awareness comes from an internationally renowned wealth management firm, Cabot Money Management. Cabot hired Schneider to conduct a public relations and social media program based on our proven ability to integrate these strategies to build brand awareness for our clients.

In addition to recommending a comprehensive program focused on generating hyper-local media coverage throughout New England (where most of Cabot's clients reside) and continuing to generate placements at the national level, we also recommended launching a Cabot LinkedIn Group to broadcast these media hits and other content to a hyper-segmented and ever-growing audience of followers using the professional social network.

In just three short months, our media relations campaign secured more than 50 marquis print and broadcast media placements, but in just the first two weeks of activity, the firm's LinkedIn Group, Investment Insights from Cabot Money Management, has attracted dozens of members and interaction on the page and continues to grow rapidly.

## **Knowing what you can do**

For any professional services company seeking to begin their own social media program, it's important to evaluate the available resources and determine what you can do internally, and what you should outsource to an agency partner. It's important to note that this kind of program will absolutely require involvement and a commitment from your employees and staff.

Excitement has been reignited in one of the original social networks that is now truly fulfilling its potential. LinkedIn recently had a very successful initial public offering, and is finally leveraging its immense professional network of 100 million by adding applications and creating new ways for people to connect.

The old expression holds true: "You need to fish where the fish are." If you're a professional services company seeking to build awareness of your company, products and services, consider LinkedIn as your ocean and this advice as your charter boat.

*Adam Bickelman is Director of Professional Services and Public Affairs for Schneider Associates in Boston. ●*

# Star speak: How Hollywood can teach speaking skills

**Imagine you have unlimited resources to design a speech that will make you the hottest commodity on the market, inspire your workforce, or close more sales. Where would you go to get the best, highest-priced writers and directors in the world? Hollywood!**

By Patricia Fripp

**W**hat makes a good Hollywood movie? The same principles that make a great keynote speech, executive presentation, and sales conversation.

The good news is that you don't need unlimited resources to hire an Oscar winning writer and director. Just learn to adapt seven basic Hollywood techniques to increase the impact of your keynote speeches, business presentations, and persuasive sales conversations.

## **Embrace the creative process**

The late, great comedian George Carlin said "creating a great speech or comedy routine is more like going on a field trip than working in a laboratory." What he meant was that the creative process is messy, more free-flowing, so just embrace it. Forget PowerPoint. With a yellow pad, a flip chart, a whiteboard, just list or mind map what content could go in your presentation. You want stories: examples, quotes, statistics and client successes. Organize the structure of your presentation in a conversational and logical way, with visuals. Special effects are not consulted until the "storyboard" is created.

## **Consider collaboration**

Collaboration is the norm in Hollywood, and it can work for speakers and presenters no matter what their audience. In Hollywood you have directors, producers, actors, set designers, makeup artists and editors who work together. If you're a sales professional making a big sale, a corporate leader who wants to inspire your international sales force, a professional speaker whose keynote speech is setting the tone for a convention, you can get value from remembering it's very difficult to be creative in isolation. When creating the next great American film or even when creating a masterpiece speech, presentation or sales conversation, who can you get to help? Do you have a mastermind group, speaking buddies, team members, a sales manager, or professional speech coach?

## **Start with a great story**

We all love stories, and whenever we hear one we feel it's a luxury. With your corporate stories, identify your main

theme, premise or purpose — your plot. I coached a recently-promoted retail executive who found himself invited to speak at the company sales meeting to 500 young store managers a week after his promotion. His challenge was to inspire managers to enthusiastically embrace a program to get their employees to contribute money-saving ideas. His subtext was "Now you can see why I deserved this promotion."

I suggested he walk on stage, look at the audience and say "we are here to talk about heroes." In seven words he proved this isn't another dull, corporate speech. "We are here to talk about heroes. They may be sitting in front of you. They may be sitting behind you. They may be you. In the trenches heroes!"

He then added some Hollywood drama with characters, dialogue, and an everyday hero. He found a story about a young man in the shipping department who noticed he was shipping seven company newsletters to the same location on the same day in separate packets. This mailroom hero asked if he could package them together with a note requesting distribution on the other end. His idea saved the company \$200,000. Relating the story added specificity and color.

## **Begin with a 'flavor scene'**

Good movies open with what's called a "flavor scene," something that grabs attention and positions the audience for what is to come. A senior scientist at Genentech grabbed the interest of a Continental Breakfast Club audience by beginning: "Being a scientist is like doing a jigsaw puzzle, in a snow storm ... at night ... when you don't have all the pieces ... or the picture you are trying to create." This proved his speech wouldn't be another technical presentation.

Your flavor scene doesn't necessarily have to lead where the audience expects it to, but it should make an impact, and it must tie in to what follows.

Don't sound the same as everyone else! Don't start by talking about your company. Create a memorable moment.

## **Create captivating characters, dialogue**

"Gone with the Wind" doesn't begin with historical background on the Civil

War. Instead we find Scarlett O'Hara sulking about the impending conflict that might interfere with her social life. Immediately, we observe her personality as frivolous, shallow and fun-loving. Characters establish themselves by their decisions and actions. Rocky Balboa agrees to fight Apollo Creed in "Rocky." Elle Woods of "Legally Blonde" resolves to go to Harvard. Nobody cares what you say about your product and service. They'd rather hear from other flesh-and-blood characters who have overcome the same obstacles. Add a backstory to your speeches. Always use "characters'" dialogue to talk about their situations. The sooner this happens, the sooner the audience gets emotionally involved.

## **Remember scene changes**

Early in nearly every movie we're introduced to a day in the life of our protagonist. Then something happens! The lead character overcomes one challenge and runs into another. This involves scene changes. The movie literally moves from point to point, maintaining interest by changing settings, focal points, emotions, and energy levels.

The biggest enemy of a speaker, no matter how good, is lack of variety. Each time you move from story to story, this is a scene change. Use variety to keep your audience interested.

## **Provide a lesson**

Legendary Hollywood producer Sam Goldwyn said, "If I want to send a message, I'll use a telegram." Yet, all great films — and speeches — have a message. However, when action and thrills serve a compelling story with a message and finish up with a heart-tugging or eye-opening conclusion, now we have what makes an unforgettable movie or speech.

Good questions will remind you of good stories and experiences. A simple question I use is "If you had one sentence rather than 45 minutes, what would you say?" The purpose is to simplify and clarify your central theme.

Stories are compelling. Most people ask "Does the audience really want to hear stories?" Yes! It's important the audience sees the person behind the position. We are motivated when we see life lessons beyond the corporate message.

*Patricia Fripp CSP, CPAE, is a Hall of Fame keynote speaker, executive speech coach and sales presentation skills trainer. She is the author of "Get What You Want!" and "Make It, So You Don't Have to Fake It!" and is Past-President of the National Speakers Association. ●*

# O'Dwyer's Guide to: PROFESSIONAL SERVICES

■ 8.11

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**Lisa Hannum**, CEO  
**Nicki Gibbs**, VP

Beehive is a strategic PR boutique located in Saint Paul, Minn. We help our clients find

creative paths from where they are to where they want to be. Our inspiration comes from listening to what their key audiences need, then engaging them when and where it matters most.

Beehive has deep expertise in professional services, including clients in banking, finance, healthcare, law, commercial real estate, advertising and marketing, and professional and trade associations.

Our team of savvy, senior strategists does its best work for clients who are ready for game-changing thinking and eye-popping results in brand strategy, executive branding, search optimization, social media strategy, media relations, employee communications, mergers and acquisitions, and crisis management.

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CooperKatz has extensive experience supporting professional services organizations, including management consultants, industry analysts, research organizations and trade associations. The firm offers a unique integration of marketing, public affairs, creative resources and digital capabilities to support clients in: Developing thought leadership programs; Executing research for publicity purposes; Organizing "experts bureaus"; Providing content-oriented media training; Connecting subject matter experts with timely marketplace issues; Securing op-eds, bylines and speaking opportunities; Developing and executing digital / social media strategies; Conceiving and designing presentations, meetings, events, videos, trade advertising and collateral materials.

CooperKatz' professional serv-

ices experience has included engagements for such clients as: American Society of Composers, Authors and Publishers (ASCAP); Association of National Advertisers (ANA); Capgemini Health; Gap International; Guardian Life Insurance Company; Jackson Hewitt Tax Service; Millward Brown; National Association of Insurance Commissioners (NAIC); Nielsen Media Research; Noblis Health Innovation; Siegel+Gale; TowerGroup; TowersPerrin; and VNU.

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Established in 1996, Edge Communications, Inc. is an innovative all-star team of senior-level communications professionals, unified by a no-nonsense approach that builds companies, brands and reputations. Through "better thinking and relentless execution," we express our work ethic and our core values of quality and premium, personal service. We're equally at home with B2C, B2B and corporate work; our clients range from startups to members of the *Fortune* 500 — in technology, professional services, emerging media and healthcare/life sciences. We think, we write, we pitch — and we use traditional and social media strategically to help our clients grow.

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The Professional Services practice of Gibbs & Soell Public Relations provides high-impact

strategic communications and tactical public relations programs to financial and professional service organizations seeking growth, recognition and leadership for their services, products or firms.

The practice provides a broad range of services, including strategic planning, communication consulting, product launch and support, events, media relations, media training, marketing communications and crisis communications programs.

Clients managed by the New York, Chicago, Raleigh and Zurich (Switzerland) offices include accounting firms, banks, bankruptcy/financial restructuring institutions, business consulting firms, investment banks/managers, insurance, industry associations, law firms, private equity, venture capital and other services institutions.

Clients: Carter Ledyard & Milburn, Commonfund, Ernst & Young — Midwest Entrepreneur of the Year Award Program, Fitzpatrick, Cella, Harper & Scinto, GE Rail Services, Investment Program Association, Jackson Lewis LLP, Million Dollar Roundtable, National Association of College and University Business Officers, Network for Teaching Entrepreneurship, Seward & Kissel, Standard Chartered Bank, and Trade Commission of Spain.

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Hope-Beckham is committed to being your best resource for public relations, marketing communications and experiential marketing services — responding quicker, working faster and smarter, and provid-



ing the best possible value.

We are dedicated to being flexible and cooperative. There is no single best way to market a company, product or service, but a variety of creative and savvy options, and we strive to consider them all.

Hope-Beckham believes it is the knowledge of the variety of options available and our ability to effectively implement those options that achieves the best results.

Whether communicating with a client's various constituencies or creating programs and events that effectively position an organization within the areas it serves, Hope-Beckham is known for its creativity and cost effectiveness.

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**Michael Layne, Managing Partner**

Marx Layne & Co. has a long and successful track record of positioning professional services firms as industry leaders in their respective sectors.

For over twenty years, our experienced account executives have launched results focused communications campaigns for attorneys, accountants, financial institutions, financial planners, turnaround-managers, architects and engineers. Our proven ability to exceed client expectations has earned us a reputation as a valued partner to our clients.

With our depth of experience, we combine the most effective marketing strategies to help professional service providers build brand equity and reputation, sell services, enhance credibility, and solidify relationships with their clients, prospects, and other stakeholders.

At Marx Layne & Company, we understand the subtle nuances and legal issues when marketing professional services. We are able to take our clients' complex messages and package them in concise written formats that are compelling to print, broadcast and new media. Importantly, we have demonstrated, time after time, that successful positioning can

generate new business and retain existing clients for professional service firms.

We reach our clients' targeted audiences through means beyond paid advertising. Our professional services firm clients retain us to position them as experts, to generate feature profiles in leading business media, to ghostwrite article submissions for professional trade publications, and to coordinate high-profile interviews in leading newspapers, magazines, radio, and TV news formats, locally, regionally and nationally.

From individual practitioners to large international firms, we position our clients through strategic initiatives including: local, national and international media relations campaigns; media training and messaging; article/editorial ghostwriting and submission; website writing, design and optimization; email campaigns; social media and online reputation management; planning and implementation of seminars; direct mail campaigns; design, writing and printing of brochures and newsletters.

In all we do, we continue to respect the correlation between dollars spent by our professional service firm clients and results.

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Nicolazzo & Associates is a nationally-known, award-winning strategic communications management firm that provides high-level professional counsel and services to a diverse, national, and international client base. A boutique organization founded in 1975 by Richard E. Nicolazzo, the firm practices a proprietary counseling model designed to leverage an organization's core strengths to enhance brand and enterprise value. Services include crisis communications management,

strategic planning and communications, investor relations, media relations and training, management consulting, merger and acquisitions communications, corporate restructurings, issues management, litigation support, labor/employee relations, community relations, market research, executive speechwriting, and branding.

Whatever the need, our team of highly experienced professionals delivers the skill set to achieve successful results. Our professionals have decades of experience in a wide range of industries and market segments. Nicolazzo & Associates is often the first choice among businesses and individuals facing complex and challenging communications issues.

The Company provides strategic communications, crisis management, litigation support, and public relations to organizations in the professional services sector, including accounting, banking, human resources, law, engineering, and wealth management. Representative major clients served in this segment include: American International Group, Amica Mutual Insurance Company, Arthur Young & Company, Aviva Life Insurance Company, Boston Bancorp, Boston Bank of Commerce, Boston Consulting Group, Caturano and Company, Choate, Citicorp, Coopers & Lybrand, Edwards Angell Palmer & Dodge, Ernst & Young, Fleet Financial Group, Foley Hoag, Goodwin Procter, Oechsle International Advisors, OneBeacon Insurance Group, Ropes & Gray, and Weil Gotshal & Manges.

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**Kassy Perry, CEO**

Perry Communications Group is an independent, full-service strategic communications firm specializing in public relations and public affairs.

Since 1996, Kassy Perry and her award winning team have had a profound impact on society with nationally recognized campaigns tackling pressing issues including land use, public health, the envi-



**Richard E. Nicolazzo, Managing Partner of Nicolazzo and Associates.**

ronment, bullying prevention, affordable housing, renewable energy, access to prescription medicines, and mental health.

From managing policy issues, leading high-profile coalitions and campaigns, and conveying our clients' compelling stories to partnering with many of the nation's top companies, we achieve success and build influence through strong relationships with policy-makers, media, regulators, and corporate leaders around the world.

Current clients include: AltaGas Renewable Energy Pacific Inc., California Travel & Tourism Commission, County Medical Services Program, Diageo, Nehemiah Corporation of America, PeaceBuilders, Pharmaceutical Research & Manufacturers of America.

## POLLOCK COMMUNICATIONS

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**Louise Pollock, President**  
**Marcie Klein, Vice President**

Pollock Communications, Inc. is a full-service, independent public relations agency in NYC with a wealth of expertise in food and nutrition, brand marketing and issues management. Entrepreneurial with a highly qualified senior account staff experienced in marketing health and nutrition products and services, Pollock Communications has broad and deep experience in communicating the taste,

*Continued on page 34*



Food Network Chef Danny Boome, host of "Celebrating 100 Years of Umami" science and sensory luncheon at the New York Academy of Sciences, flanked by Marcie Klein and Louise Pollock of Pollock Communications and Lisa Watson of Watson-Mulhern.

## NICOLAZZO & ASSOCS.

Continued from page 33

health and lifestyle benefits of brands and commodities to consumer, retail, healthcare professional and business audiences. Of note is the agency's innovation in developing a vast network of registered dietitians, who work with the agency as media spokespersons and consultants on a variety of dietary and health related products and issues.

Pollock specializes in targeted and impactful marketing and issues management for professional services businesses, and is adept at communicating the lifestyle benefits of brands and commodities to consumer, retail, healthcare professional and B2B audiences.

Additionally, the agency has been successful in developing strategic alliances and partnerships with professional groups and health organizations that lend third party credibility to clients. The agency has longevi-

ty yet is on the cutting edge of the newest public relations techniques, including innovative work in the digital and social media space. Visit us on Facebook (search: Pollock Communications).

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Quinn & Co. combines strong

strategic thinking with our signature creative approach to develop dynamic integrated PR programs. We consult clients in our core areas of Real Estate, Travel and Food, Wine + Spirits to achieve goals, reach target audiences with key message points and ultimately drive business.

Quinn & Co.'s award-winning real estate division is the industry go-to for groundbreaking campaigns. Amidst this ever-changing economic landscape, we've helped turnaround client projects, revamp reputations and expertly manage crisis communications by conceptualizing and implementing dynamic, multi-platform campaigns that have successfully positioned clients for today's evolving market.

Quinn & Co.'s results-driven approach to integrated PR has helped create and maintain momentum for our diverse roster of well-regarded residential, commercial, developer, broker, investor, legal and architecture clients worldwide. Recent campaigns include the innovative collaboration between high-end condominium The Sheffield and Saks Fifth Avenue, the first time Saks has partnered with a real estate entity to offer residents such insider perks as a personal shopper and closet consultation; the successful relaunch of formerly stalled condominium be@schmerhorn, where ongoing promotions and reputation management helped propel the project to stand as the best-selling New York condominium in 2010; and the groundbreaking partnership between Holton Farms and the Albanese Organization, the City's first farm-to-building delivery program that garnered prominent coverage in the *New York Times*, *NY1* and *Entrepreneur*.

Quinn & Co. also managed media relations following the sale of trophy property 111 Eighth Avenue by Taconic Investment Partners to Google — the largest commercial property sale last year. The game-changing sale gained homerun, international coverage in such outlets as the *Wall Street Journal*, *New York Times*, *Fortune*, *Financial Times* and the *International Business Times*.

Our 15-strong team, one of the largest real estate-focused divisions in the industry, continues to grow and thrive. New client additions include Trump Soho, Denihan Hospitality Group, Beatrice, Continental, The

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The team at Quinn & Co. Public Relations with Florence Quinn, president, and Suzanne Rosnowski, partner in real estate, in the forefront.





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**Schneider Associates' President and Creative Director Joan Schneider (left) and COO/Partner Phil Pennellatore.**

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## THE VANDIVER GROUP, INC.

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The Vandiver Group, Inc. (TVG) is an award-winning strategic communications firm helping clients build brands, reputations and relationships by providing strategy, branding, public relations, social media, creative, web design/content, market research, reputation/image management/crisis communications, CSR and executive/employee training. TVG's proprietary Pulse® Feedback Software is used to gather public and employee comment and engage users in conversation. It organizes the feedback into key

themes/topics allowing organizations to identify issues and track them. Founded in 1993 and based in St. Louis, TVG has satellite offices in Nashville, Kansas City and Los Angeles. Donna Vandiver is Chairman of Pinnacle Worldwide, a network of 65 premiere PR agencies around the world. TVG is a member of CPRF and a charter member of WOMMA, with individuals who belong to PRSA & IABC. Our clients are Fortune 500 and mid-sized companies in industries such as agriculture, banking, healthcare, transportation, education, government, utilities, not-for-profits and professional services.

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Zeppos & Associates, Inc. is a full-service public relations and government affairs firm providing strategic counsel, fresh ideas and practical results to clients throughout Wisconsin, the Midwest and the United States. The firm's award-winning, 12-person team includes former journalists and seasoned public relations practitioners who specialize in strategic communications, publicity, crisis communication, social media, government affairs, issue management, special event planning and media relations. The firm has significant experience with clients in the professional services arena, including law firms, accounting firms, real estate, medical and dental practices, engineering companies, lawn service businesses and others. ●



**The Vandiver Team (L to R): Donna Vandiver, President & CEO and Amy Crump, Chief Financial Officer.**



**The Professional Services team at Zeppos & Associates.**



# O'DWYER'S RANKINGS

## TOP PROFESSIONAL SERVICES PR FIRMS

<b>1.</b> Edelman	New York	<b>\$37,960,905</b>	<b>36.</b> Standing Partnership	St. Louis	<b>596,296</b>
<b>2.</b> Qorvis Communications	Wash., D.C.	<b>10,469,820</b>	<b>37.</b> French   West   Vaughan	Raleigh	<b>575,669</b>
<b>3.</b> Widmeyer Communications	Wash., D.C.	<b>5,395,695</b>	<b>38.</b> Affect	New York	<b>524,459</b>
<b>4.</b> APCO Worldwide	Wash., D.C.	<b>4,536,000</b>	<b>39.</b> Linhart PR	Denver	<b>524,255</b>
<b>5.</b> MWW Group	E. Rutherford, NJ	<b>4,154,000</b>	<b>40.</b> CJP Communications	New York	<b>519,420</b>
<b>6.</b> Hager Sharp	Wash., D.C.	<b>4,121,214</b>	<b>41.</b> Pierson Grant PR	Ft. Lauderdale	<b>509,700</b>
<b>7.</b> Schwartz Communications	Waltham, MA	<b>4,033,728</b>	<b>42.</b> Jackson Spalding	Atlanta	<b>489,636</b>
<b>8.</b> Capstrat	Raleigh	<b>4,000,000</b>	<b>43.</b> McNeely Pigott & Fox	Nashville	<b>428,810</b>
<b>9.</b> Peppercom	New York	<b>2,847,806</b>	<b>44.</b> Dukas Public Relations	New York	<b>425,000</b>
<b>10.</b> Beckerman	Hackensack, NJ	<b>2,800,000</b>	<b>45.</b> Lane PR	Portland, OR	<b>405,837</b>
<b>11.</b> Ruder Finn	New York	<b>2,500,000</b>	<b>46.</b> Middleberg Comms.	New York	<b>350,800</b>
<b>12.</b> 5W Public Relations	New York	<b>2,200,000</b>	<b>47.</b> Seigenthaler PR	Nashville	<b>335,623</b>
<b>13.</b> Bliss PR	New York	<b>2,057,000</b>	<b>48.</b> Casey Comms.	St. Louis	<b>330,524</b>
<b>14.</b> Quinn & Co.	New York	<b>2,041,530</b>	<b>49.</b> Kohnstamm Comms.	St. Paul	<b>296,870</b>
<b>15.</b> Beehive PR	St. Paul	<b>2,032,370</b>	<b>50.</b> Winning Strategies PR	Newark	<b>275,980</b>
<b>16.</b> Regan Comms. Group	Boston	<b>1,947,500</b>	<b>51.</b> Schneider Associates	Boston	<b>254,173</b>
<b>17.</b> Rasky Baerlein Strat. Comms.	Boston	<b>1,866,234</b>	<b>52.</b> Maccabee Group	Minneapolis	<b>252,817</b>
<b>18.</b> rbb PR	Coral Gables, FL	<b>1,804,627</b>	<b>53.</b> Zeno Group	New York	<b>187,653</b>
<b>19.</b> Levick Strategic Comms.	Wash., D.C.	<b>1,655,629</b>	<b>54.</b> Peritus	Louisville	<b>183,750</b>
<b>20.</b> Allison & Partners	San Francisco	<b>1,552,000</b>	<b>55.</b> Hope-Beckham	Atlanta	<b>180,760</b>
<b>21.</b> CooperKatz & Co.	New York	<b>1,468,166</b>	<b>56.</b> Zeppos & Associates	Milwaukee	<b>161,230</b>
<b>22.</b> ETC	Cincinnati	<b>1,168,000</b>	<b>57.</b> O'Malley Hansen Comms.	Chicago	<b>119,000</b>
<b>23.</b> Lambert, Edwards & Assocs.	Grand Rapids, MI	<b>1,149,300</b>	<b>58.</b> Richmond PR	Seattle	<b>115,045</b>
<b>24.</b> LVM Group	New York	<b>1,103,000</b>	<b>59.</b> Intermark PR	Birmingham, AL	<b>103,250</b>
<b>25.</b> Black Twig Comms.	St. Louis	<b>1,100,000</b>	<b>60.</b> Red Sky PR	Boise	<b>100,000</b>
<b>26.</b> Gibbs & Soell	New York	<b>1,023,708</b>	<b>61.</b> Ron Sachs Comms.	Tallahassee	<b>96,700</b>
<b>27.</b> Gregory FCA	Ardmore, PA	<b>1,000,000</b>	<b>62.</b> Michael A. Burns & Assocs.	Dallas	<b>95,270</b>
<b>28.</b> IW Group	W. Hollywood	<b>917,000</b>	<b>63.</b> Dawson + Murray + Teague	Dallas	<b>77,092</b>
<b>29.</b> Perry Comms. Group	Sacramento	<b>909,995</b>	<b>64.</b> Rosica PR	Paramus, NJ	<b>76,062</b>
<b>30.</b> Makovsky + Co.	New York	<b>900,000</b>	<b>65.</b> Katcher Vaughn & Bailey	Nashville	<b>71,900</b>
<b>31.</b> Gibraltar Associates	Wash., D.C.	<b>829,128</b>	<b>66.</b> Edge Comms.	Encino, CA	<b>60,051</b>
<b>32.</b> Boardroom PR	Plantation, FL	<b>775,000</b>	<b>67.</b> Powell Group	Dallas	<b>46,997</b>
<b>33.</b> Padilla Speer Beardsley	Minneapolis	<b>766,282</b>	<b>68.</b> The Rogers Group	Los Angeles	<b>33,841</b>
<b>34.</b> PAN Comms.	Andover, MA	<b>672,000</b>	<b>69.</b> Mdi media group	Mobile, AL	<b>21,965</b>
<b>35.</b> L.C. Williams & Assocs.	Chicago	<b>653,921</b>			



# Crisis Mgmt. 2011: Exxon dos, Murdoch don'ts

By Fraser Seitel

**A**lright you budding crisis managers, you decide. Who do you think will make out better in a 21st century, social media driven, front page crisis — a savvy media company or a reticent, conservative oil company?



Fraser P. Seitel has been a communications consultant, author and teacher for 30 years. He is the author of the Prentice-Hall text, *The Practice of Public Relations*.

If you took the oil giant — Exxon — over the media conglomerate — News Corp. — you won.

Indeed, the differences in the handling of last month's crises by these two behemoths should serve as ready instruction as to what works and

what doesn't when crisis strikes in the 21st century.

Exxon gets an "A" for taking charge and acting decisively when an oil spill in Montana threatened its reputation yet again. News Corp gets an "F" for the way it stonewalled, backpedaled and otherwise ignored the British hacking scandal that continues to threaten its vast empire.

Here's what we can learn from these

ongoing situations.

First the good.

## Exxon gets out in front

PR students for generations have studied how the world's largest oil company polluted the pristine Gulf of Valdez in Alaska in 1989 and then botched the public relations response to historical proportions.

Most famously, the Exxon Valdez spill yielded this unforgettable line from CEO Lawrence Rawl, in response to a journalist's question as to why, months later, the chairman still hadn't even visited the scene of the spill. Said Rawl, "I had better things to do."

Ooofa.

But that was then, and this is now. And the new Exxon, having learned from its merger with the more outgoing and public Mobil Corp. in 1999, is, today, a model of savvy crisis management.

When the company suffered a spill on July 1 near Billings, it didn't wait around like its former chairman to see what might wash ashore.

**First**, the ExxonMobil Pipeline Company apologized to the people of Montana for the breach and vowed to make sure the spill was cleaned up.

**Second**, the company set up a Crisis Command Center and dispatched 700 cleaner-uppers to the spill, within hours of the first reports.

**Third**, the company immediately made contact with Montana's governor, senators, representatives and other elected officials, as well as regulators for the environment and wildlife rescue, to keep the cleanup coordinated.

**Fourth**, in terms of continuing communication, Exxon's communications director used his blog to update the public on the company's response and progress.

Said Exxon's Public Affairs Vice President Ken Cohen, "The biggest lesson is stay accessible, stay available and get after the cleanup immediately."

If only Rupert Murdoch's News Corp. followed this advice.

## News Corp. gets crushed

Where Exxon's handling of its Montana spill was the "good" of crisis management, News Corp.'s inexplicable botching of its hacking scandal was both the "bad" and the "ugly."

*(Full disclosure: I occasionally appear on News Corp.'s Fox News Network, and always appreciate the invitation to display my battered old mug on national TV. So I've always rather liked Rupert*

*Murdoch.)*

But this burgeoning News Corp. crisis — which has now forced the resignation of Britain's top law enforcement official, the arrest of the former CEO of News International, the beheading of the *Wall Street Journal* Chief, and increasing pressure on the British prime minister — couldn't have been handled worse.

From the get-go, News Corp. and its defenders played down the scandal as a "hacking problem" that happened nine years ago, committed by low level employees, and had been dealt with appropriately.

Wrong. Wrong. Wrong.

In the 21st century, perception is reality. This wasn't perceived as a "hacking problem," it was a "decency" or an "ethics" problem. And whether "old news" or not, it needed to be dealt with forcefully, right now, not dribbled down the field hoping the public would lose interest.

Indeed, the ham-handed attempt to "close down" the scandal by ceasing publication of the offending *News of the World* publication — which would have been replaced by another Murdoch vehicle — only enflamed British legislators and Murdoch enemies further.

The only real way to begin to "close down" the turbulence was to fire Rebekah Brooks, the lightning rod chief of the paper. In a cataclysmic crisis like this one, no one will be satisfied until the heads of those responsible are put on the chopping block. It may be medieval and unfair, but a crisis can't end until a "villain" is punished.

And this, alas for Rupert Murdoch, proved to be his Achilles' heel. Canning his trusted colleague — his "surrogate daughter," as observers put it — was a decision Rupert couldn't make. And so, for two excruciating weeks, Mr. Murdoch and Ms. Brooks gutted it out in the foxhole, as News Corp.'s credibility deteriorated.

This failure to fire early on the one individual in charge of the inexcusable hacking offenses, more than anything else, was key to why News Corp. and its CEO still find themselves in such peril.

Left with falling executives and fading reputation, News Corp. had no choice but to finally call in crisis management experts at Edelman to try to staunch the blood-letting.

And what was Edelman's first suggestion to its tottering client?

Fire Rebekah Brooks! ●

## News briefs

### ENVIRONMENTALISTS TAKE AIM AT SHELL'S ARCTIC PLAN

A coalition of environmental groups has launched a year-long PR campaign aimed at stopping oil drilling in the Arctic Ocean. It kicked off the drive with launch of the OurArcticOcean.org website and a full-page ad in Politico.

Shell Oil plans to begin drilling for oil off the Alaska coast next year after receiving Clear Air Act permits.

The group's "United for America's Arctic" campaign says there is "lack of scientific information about the Arctic Ocean," and its fragile ecosystem that supports coastal communities and "iconic wildlife," such as polar bears, beluga/bowhead whales, walrus and seals.

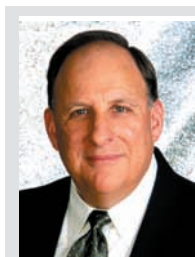
They believe it would be nearly impossible to clean up a spill due to sea ice, extreme cold, hurricane-strength storms and pervasive fog. The Arctic also lacks a port big enough to support large response vehicles.



# Debt vs. equity and same-sex marriage

By Richard Goldstein

Last month I discussed the tax implications of taking advances from a corporation and/or making loans to it. This month I will review the same issue for an S corporation. In addition, I will address the tax and financial implications of the New York legislature approving same-sex marriage.



**Richard Goldstein** is a partner at Buchbinder Tunick & Company LLP, New York, Certified Public Accountants.

## S corporation debt

More often than not, when an S corporation is formed, it's capitalized with equity. However, at times there is a mixture of debt and equity or subsequent increases

in debt should the agency require additional cash. If the agency has more than one shareholder, and all the shareholders do not have the cash to make pro rata contributions, debt may be used. For example, assume an agency has two shareholders each to own a 50% equity interest. If the needed cash infusion is \$200,000 and one of the shareholders (A) can only contribute \$75,000, the other (B) can contribute \$75,000 as equity and \$50,000 as debt.

A shareholder is allowed to deduct losses from operations against his or her basis in loans to the corporation after the stock basis is reduced to zero. Assume the agency loses \$200,000 during its first year of operation. The loss is divided \$100,000 to each shareholder. However, shareholder A can only deduct \$75,000 (stock basis) and shareholder B \$100,000 (\$75,000 stock basis and \$25,000 of loan basis). A shareholder could lend money or property to an S corporation in two forms — by a written note or an open account (e.g., just writing a check to the corporation). Note, open account debt is not recommended and will be discussed below.

## Consequences of using debt

In some cases using debt can terminate the S election. The IRS can view the debt as a second class of stock. Because an S corporation can only have a single class of stock, the debt being viewed as other than debt can terminate the election.

In order to avoid this result, Congress created a concept called "straight" debt. The Internal Revenue Code provides that straight debt will not be treated as a second class of stock and therefore avoids the possibility of

a termination. There are several criteria to have straight debt. One is the debt must be written and must constitute an unconditional promise by the borrower to pay a sum certain on a specified date or on demand. Another is the debt must be interest bearing.

Shareholders planning on making loans to a corporation that does not meet the straight debt requirements should exercise caution: reclassification of the debt as stock will generally result in termination of S status effective as of the date of issuance of the debt.

## Treatment between S corp., shareholders

Going back to the example above, assume that B used his/her entire debt basis to deduct losses. In other words, B has no stock or debt basis left. Unlike stock, a shareholder cannot restore debt basis by contributing money or property. Rather, the loan basis can be restored only by applying subsequent years' profits. Assume that the S corporation repays the debt to the shareholder at a time when the shareholder's basis in the loan is zero. The repayment will be considered a financial/legal loan repayment, but it will result in a taxable transaction to the shareholder. Because the loan repayment is made at a time when there is no loan basis, the repayment will be considered ordinary income subject to tax at the individual's highest rate. If, on the other hand, the loan was evidenced by a written note, the loan repayment would be considered a capital gain taxed currently at 15%.

## Same-sex marriage

I have limited my discussion of debt versus equity due to recent events in New York State. As many of you are aware, On June 24, the New York State legislature passed the Marriage Equality Act. New York is the sixth state to do so. Same-sex couples will now be able to get married and have the same legal rights and financial benefits enjoyed by heterosexual married couples in New York.

There is a catch however, to the New York law. That catch is federal law — the "Defense of Marriage Act." The law continues to disregard same-sex marriages and denies all federal rights and benefits to the same-sex spouse.

It does this among other provisions, simply by stating the word 'marriage' means only a legal union between one man and one woman, and the word 'spouse' refers only to a person of the opposite sex.

Fast forward to the filing of a 2011 tax return: because marital status is determined on the last day of the taxable year, how will a same-sex couple file? For income tax purposes, same-sex couples are allowed to file jointly in New York. However, for federal purposes, they are required to file as single with separate returns. ●

## 78-year-old novelist seeks PR firm to help promote his new book, *What Money Can Buy*.

The protagonist invented the subprime mortgage, the credit default swap and the consolidated mortgage obligation, the very weapons that nearly destroyed the economies of the world.

**Impossible to promote? Right! But promoting the author and through him the book should be easy.**

I've spent 43 years as a trial lawyer. When I retired, I enrolled at Columbia University and obtained a master's in philosophy. I then tried to become a master in chess. I failed, but did obtain a much lower rating.

My memoirs, *A Happy Life: From Courtroom to Classroom* was published in 2009. I spent the next two years writing my novel.

I think my retirement activities can generate a lot of publicity. What I need is a PR firm to plan and guide me through the process. I am presentable, articulate and witty.

## Your reward:

The satisfaction of helping an old man reach his goal and a fat pay check.

Sidney Silverman  
SBSNY@aol.com

## CDC toxic unit seeks rapid response PR help

**T**he unit of the Centers for Disease Control and Prevention that handles environmental health and toxic substances has released an RFP to potentially hire multiple firms to handle rapid response communications as needed.

The RFP outlines a contract with a \$10 million ceiling.

The pact will be on an IDIQ, or as needed basis, and could go to a single agency or multiple firms.

The National Center for Environmental Health, Agency for

Toxic Substances and Disease Registry put out a feeler in April to gauge agency interest, noting then that an RFP could be forthcoming.

The proposal request with the center's office of communication calls for support as its scientists and investigators probe

hazardous waste sites around the U.S. "Issues at such sites often arise suddenly in response to emerging science, news events or new information presented," says the RFP.

The center, for example, is currently working with the EPA on the Exxon crude oil spill in the Yellowstone River.

Experience in environmental health communication and risk communication are required. •



A 2009 town hall meeting held by the Agency for Toxic Substances and Disease Registry.

Photo: CDC

## Google adds Dem, GOP lobbying powerhouses

**G**oogle has ramped up its defense in the Government's antitrust push, adding a powerful Democratic firm, Gephardt Group, and Republican juggernaut, Crossroads Strategies, to its lobbying team.

The firm of former House Majority Leader and Presidential candidate Dick Gephardt has represented heavyweight clients such as General Electric, U.S. Chamber of Commerce, Anheuser-Busch, Visa, Peabody Energy and Boeing.

Gephardt spearheads Team Google of Tom O'Donnell, former chief of Staff to the Missouri Congressman, Kyle Mulhall, senior policy advisor, and Catherine Goode, a recruit from Quinn Gillespie.

Crossroads Strategies has handled the National Rifle Assn., AT&T, Verizon, Southern Co., Mars Inc. and Altria.

Its Google lobbyists worked for three powerful southern Republican Senators including John Green, (deputy chief of staff to Mississippi's Trent Lott), Stewart Hall (legislative director to Alabama's Richard Shelby) and Hunter Moorhead (legislative aide to Mississippi's Thad Cochran and Bush II White House staffer). •



## NAHB nabs PPG

**T**he National Assn. of Home Builders has retained Prime Policy Group to handle regulatory and tax reform issues for the trade group that represents more than 160,000 construction companies and housing remodelers.

The NAHB has warned that the scheduled Oct. 1 drop in mortgage loan limits for government sponsored Fannie Mae, Freddie Mac and Federal Housing Administration loans could deal a blow to the market that is "still struggling to get back on its feet," according to a statement from NAHB chairman Bob Nielsen.

PPG, which is a Burson-Marsteller unit, fields Charlie Black, former Republican National Committee spokesperson and aide to former presidents Reagan and Bush I; Mark Disler, ex-staffer for Utah Senator Orrin Hatch and Erin Graefe, aide to former House Speaker Nancy Pelosi, on the NAHB team.

The Commerce Dept. reported that sales of newly built single-family homes declined 2.1 percent in May to a seasonally adjusted rate of 319,000 units.

NAHB says the April and May numbers represent "some very slow improvement, which should continue as expected economic gains boost consumer confidence." •

## Panetta names PA team

**N**ewly minted Secretary of Defense Leon Panetta has named his top public affairs lieutenants, including a top PA aide during his tenure as CIA director and a PA advisor to Adm. Mike Mullen, chairman of the Joint Chiefs of Staff.

George Little, director of PA for Panetta at the CIA since October, moved to the Pentagon on July 19 as deputy assistant secretary of defense and press secretary. He takes over for Geoff Morell, a former ABC News correspondent who stepped down last month with the exit of Defense Secretary Robert Gates.

Panetta has also tapped Mullen PA aide Capt. John Kirby as deputy assistant secretary of defense/spokesman and director of media operations. A Navy PA officer, he has been on Mullen's communications team for 10 years and will take up the new post in August.

Doug Wilson remains the Pentagon's top PA official, to whom the new recruits will report. Wilson, in a statement, called Little and Kirby "two of the most respected and trusted communicators in Washington." •



## Monitor cuts \$6.7M Libya pact

**M**onitor Company Group, which officially terminated ties with Libya and Jordan on July 1, received \$6.7 million in fees/expenses from Col. Gaddafi's government from October 2006 to January 2009, according to its just released Justice Dept. filing. On April 27, Jordan paid Monitor \$871,000 in fees/expenses.

In its activities report, Monitor says it arranged personal meetings with Gaddafi for luminaries such as Richard Perle, President Reagan's Assistant Secretary of Defense and noted neoconservative pundit, Francis Fukuyama, political scientist and author of "The End of History & The Last Man," and Benjamin Barber, professor/political theorist/author/Bill Clinton advisor.

Perle discussed developments in the war in Iraq, possible U.S./Libya collaboration, strategies to combat terrorism and the need for Libya to boost its human rights record.

Fukuyama lectured at Gaddafi's "Green Book Center" on the challenges of building a democracy in Libya, discussed the writings of John Locke, role of American power in the Middle East and dangers posed by the spread of radical Islam.

Barber served on a panel discussion organized by David Frost, met with Libya's Constitutional Committee and talked about applying the philosophy of Gaddafi's Green Book to modern Libya.

Monitor paid Perle \$50,000 in fees and \$11,000 in expenses for his first trip to Libya in '06. He received five \$10,000 payments to cover additional visits. Barber received about \$102,000 for his visits. Frost's production company got a payment of \$91,429. Fukuyama received a payment of less than \$350, though Monitor did provide him copies of Gaddafi's Green Book for use in his political science course.

Monitor also relied on the services of Larry Weber's Racepoint, which received \$300,000 for PR services. ●

## Publicis makes splash in Brazil

**P**ublicis Groupe on July 12 announced the purchase of a 70 percent stake in Brazil's DPZ, one of the country's top ad agencies.

The 230-member shop is based in São Paulo and boasts clients such as Coca-Cola, Azul Linhas Aéreas (airline), Bombril (household products), and Vivo (telecommunications).

DPZ's three founders (José Zaragoza, Francisc Petit and Roberto Duailibi) agreed to remain on board along with CEO Flávio Conti.

Brazil is in the midst of a \$1 trillion construction boom to ready for the 2014 World Cup and 2016 Rio Olympics. Publicis CEO Maurice Levy says the DPZ deal fits the France-based combine's decision to strengthen its position in the fast-growing markets of Brazil and China. ●

### FARA News



## NEW FOREIGN AGENTS REGISTRATION ACT FILINGS

Below is a list of select companies that have registered with the U.S. Department of Justice, FARA Registration Unit, Washington, D.C., in order to comply with the Foreign Agents Registration Act of 1938, regarding their consulting and communications work on behalf of foreign principals, including governments, political parties, organizations, and individuals.

**Covington & Burling LLP**, Washington, D.C., **registered June 3, 2011 for Government of Spain**, Embassy of Spain, Washington, D.C., regarding providing advice and other assistance on legislative and policy matters concerning sunken vessels and their remains and contents in which Spain has an interest, specifically including proposed amendments to the Sunken Military Craft Act.

**Jackson Kelly PLLC**, Washington, D.C., **registered June 29, 2011 for Australian Aerospace Composites Ltd.**, Trade Coast Central, Queensland, Australia, regarding consultation and advice in connection with the pursuit of Federal Government contracts, including implementation of required compliance programs.

**KWR International, Inc.**, New York, N.Y., **registered June 29, 2011 for Promotion and Investment Board, Province of Riau Islands**, Tanjungpinang, Indonesia, concerning working with the principal to update and manage the riauisslandsftz.com website, promote interest in the province and facilitate interactions with potential investors, journalists and other interested parties.

### Lobbying News



## NEW LOBBYING DISCLOSURE ACT FILINGS

Below is a list of select companies that have registered with the Secretary of the Senate, Office of Public Records, and the Clerk of the House of Representatives, Legislative Resource Center, Washington, D.C., in order to comply with the Lobbying Disclosure Act of 1995. For a complete list of filings, visit [www.senate.gov](http://www.senate.gov).

**Barbour Griffith & Rogers, LLC, d/b/a BGR Holding**, Washington, D.C., **registered June 22, 2011 for Association of American Railroads**, Washington, D.C., regarding counsel and guidance on potential federal regulatory and legislative initiatives that could impact the railroad industry.

**Bingham McCutchen LLP**, Washington, D.C., **registered July 13, 2011 for Google**, Washington, D.C., regarding competition issues.

**Cassidy & Associates, Inc.**, Washington, D.C., **registered July 13, 2011 for Actors Equity Association**, New York, N.Y., regarding issues relating to the Qualified Performing Artists tax preference.

**Dickstein Shapiro LLP**, Washington, D.C., **registered June 23, 2011 for The ServiceMaster Company**, Memphis, Tenn., regarding monitoring legislative issues related to the treatment of home warranty companies and home service contracts under the Real Estate Settlement Procedures Act.

**Fierce, Isakowitz & Blalock**, Washington, D.C., **registered July 8, 2011 for Kellogg Company**, Battle Creek, Mich., regarding food safety and nutritional labeling.

**Foley & Lardner LLP**, Washington, D.C., **registered July 13, 2011 for Van Dyne SuperTurbo**, Fort Collins, Colo., regarding federal funding for engine development.



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### Senior Account Executive

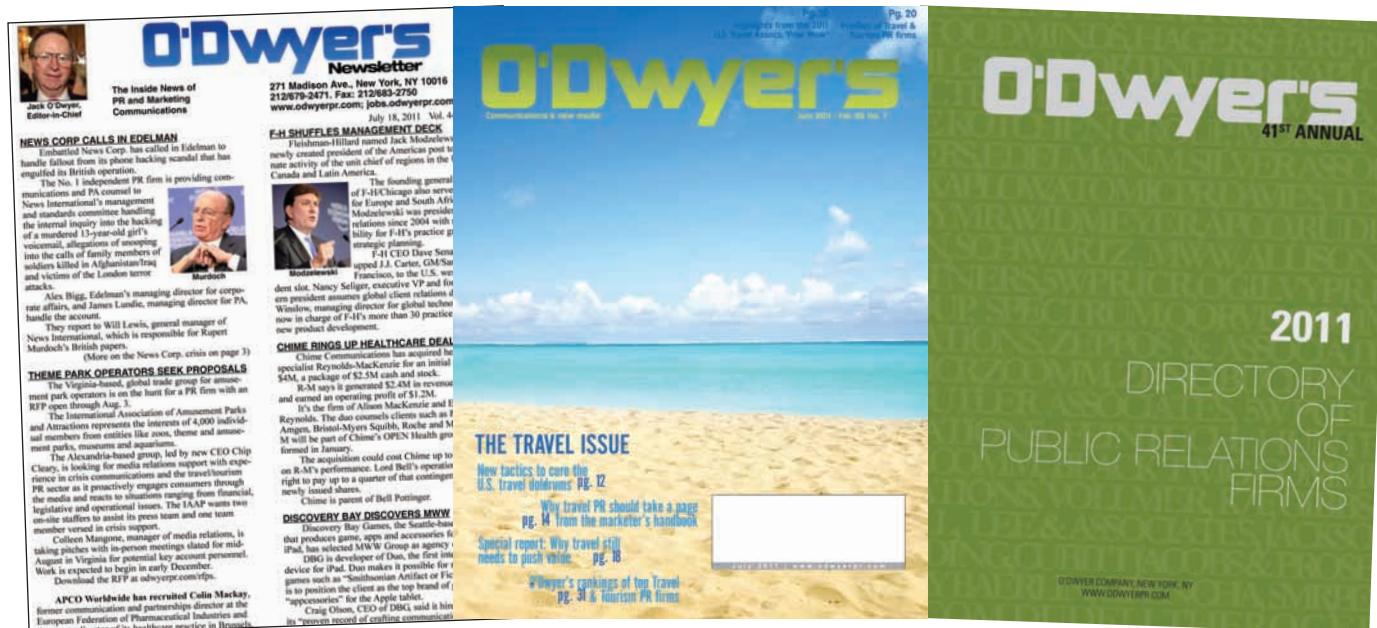
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