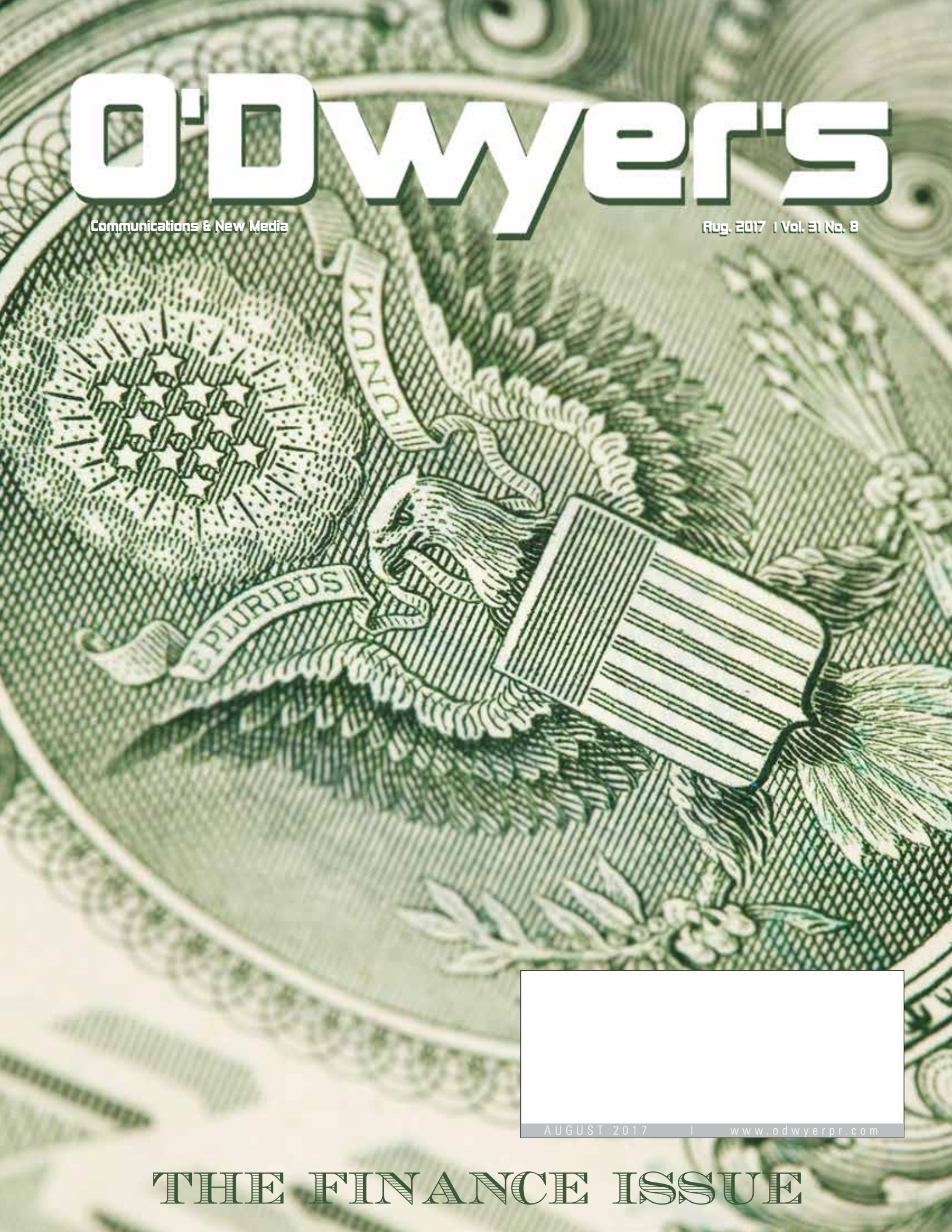


# O'Dwyer's

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AWARDS





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# Impeachment is a pipe dream

If part of your media diet consists of cable TV or the Internet, you may be inclined to believe that President Trump is already on his way out. “Trump Will Probably Be Impeached,” “How Trump Could Get Fired,” and “Will Trump Be Impeached or Resign?” are just a few of the more aggressively optimistic headlines to grace news outlets in recent weeks.

A recent USA TODAY/iMediaEthics poll revealed that 42 percent of Americans now support Trump’s removal from office. (Democratic polling firm Public Policy Polling’s figures were much higher, with 47 percent of voters in July claiming they support Trump’s impeachment). These numbers map squarely onto the fact that Trump’s job approval can be currently characterized as “underwater”: 60 percent of voters believe the Trump administration is running chaotically, according to a July Politico/Morning Consult poll, and even right-leaning Rasmussen now scores the President’s approval rating at only 39 percent, a nadir for that polling agency.

As it turns out, media fantasies of 45’s abdication aren’t particularly new. “Could Trump Be Impeached Shortly After He Takes Office?” was the headline of an April 2016 Politico article, written before he was even named Republican nominee. Indeed, the constant theater of dysfunction within the White House, the despotic behavior of an administration besieged by crisis and the amateur-hour quality of his communications team invariably conjure an image of Rome burning to the ground. That said, I still think some of us are putting the cart well before the horse when it comes to this impeachment business.

First, it deserves to be asked: impeached by whom, exactly? The special counsel appointed by Trump’s Justice Department? Or a Republican Congress that’s getting everything it wants — from tax reform initiatives to a number of regulatory rollbacks — because of Trump? People are quick to compare Trump’s May firing of FBI Director James Comey to Nixon’s purging of the Justice Department in 1973, but what they fail to consider is that impeachment is an inherently political process; it happens when you can count to 218 in the House and 67 in the Senate. Nixon resigned because he did the math and saw what was coming, and those numbers simply don’t apply to Trump, and they never will unless — and only unless — he does something so damning that it poses a grievous threat to Republicans’ Congressional majority and sacrifices their chances of maintaining the House in 2018. Considering the GOP is still winning special elections on his coattails as of a few months ago, my bet is that impeachment isn’t on the menu.

At least not yet. A far more likely scenario is that Trump begins hanging himself by his own rope, thereby isolating himself from the GOP in the process. In the end, it might not be Trump’s firing of Comey that leads special counsel Robert Mueller to the smoking gun, but the bombshell news that Trump had personally contrived Donald Trump Jr.’s misleading statements regarding his 2016 meeting with a Kremlin-connected lawyer to discuss damaging information on Hillary Clinton, even though Trump’s lawyers unequivocally stated the President played no role in crafting that statement.

It’s a Shakespearean end to a drama if there ever was one, but what certainly isn’t helping is the reality TV façade of it all, the fact that when we watch the news anymore we feel compelled to think we’re witnessing an episode of “The Apprentice, White House Edition.” It’s the inveterate instability of the administration that underscores the trouble in which it now finds itself, a series of high-profile departures that now include the ouster of chief of staff Reince Priebus and resignation of press secretary Sean Spicer. The absurdity reached its apogee with the short-lived reign of White House communications director Anthony Scaramucci, who tried to out-Trump Trump and resorted to publicly trash-talking his new colleagues, forcing Priebus off the ship in the process before, in a Swiftian twist of fate, Priebus’s replacement, John F. Kelly, fired him. Now Trump appears ready to vote attorney general Jeff Sessions off the island as well, presumably so he’ll be replaced with someone who’ll fire Mueller, or at least do more to protect Trump from the looming Russia investigations.

For the first six months of his presidency, the White House’s order of business had been to refine Trump’s actions into words that were palatable within the party. Now there seems to be an entirely new strategy: clear the cabinet of party loyalists and replace them with an incoming team of hardline sycophants who are willing to let Trump be Trump. They’ve gone from doing things by the book to burning the book.

What we’re now seeing is an inevitable, slow divorce between the White House and the Republican Party. If the disastrous recent attempt to repeal the Affordable Care Act was Trump’s reminder of the legislative albatross that awaits him, Congress’ recent Russia sanctions bill is the strongest indication yet that the Republican majority in Congress no longer trusts Trump, and they’re not willing to go down with the ship. We’re only six months in, and amid paralyzing scandals, souring relations with Russia and North Korea’s fast-track to developing a missile capable of reaching the West Coast, it’s now clear that Congressional Republicans are getting diminishing returns with their Commander in Chief. No one is getting what they want here, and the honeymoon appears to be over. ○

— Jon Gingerich



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# Marketers value, misunderstand AI

Retail marketers embrace artificial intelligence technologies, but most lack the required skills to put this technology into practice.

By Jon Gingerich

Retail marketers are willing to embrace artificial intelligence technologies, but a lack of technical skill required to utilize that technology could be preventing its mainstream adoption, according to a new study of the retail and e-commerce industries commissioned by Vienna, Austria-based cloud marketing software provider Emarsys.

The new study, which sought to understand whether automated marketing is primed for today's retail and e-commerce sectors, found that a clear majority of marketers and business decision-makers embrace automated technology, with 88 percent claiming AI marketing is poised to reinvent the retail industry and 81 percent believing AI marketing will reinvent what their company does in some capacity.

Most respondents expect that AI will change how marketers work as a whole (82 percent), and many believe that automated marketing will make their marketing teams more efficient and effective (86 percent), and that its use will shift marketing's role

toward more strategic work (79 percent) or enable them to focus on various value-generating tasks as AI automates workflows (82 percent).

However, the study also found that 70 percent of business stakeholders believe their marketing teams don't necessarily understand AI marketing and currently lack the technical skills to properly leverage this technology in their communications toolkit. 66 percent additionally found the prospect of executing an artificial intelligence strategy to be overly complex and inflexible, and 65 percent expressed not having the product management skills required for keeping up with the critical innovation that's needed in AI marketing.

Taken together, the study suggests that while artificial intelligence is seen as a highly-regarded marketing tool, a number of significant barriers exist in making the adoption of this technology a reality.

According to the Emarsys study, another clear majority of retail and e-commerce firms polled — three out of five — said they

plan to implement AI marketing technologies within the next year, and 78 percent said they plan to spend at least five percent more on AI marketing technologies within that time frame compared to years past.

However, relatively few retail organizations (11 percent) fall under the category of AI "experts," according to the study, strategically and organizationally prepared to leverage the technology. A majority — 63 percent — said it will take more than three years to fully leverage AI marketing. ○

## Dems more likely to trust news sources

By Jon Gingerich

Democrats and Republicans exhibit a surprisingly similar range of news-viewing habits, but Republicans tend to be less satisfied than Democrats with the media sources they use, including sources they pay for and use often, according to a July study released by the Media Insight Project, a joint research initiative between The Associated Press-NORC Center for Public Affairs Research and the American Press Institute.

In general, Democrats are more likely than Republicans or independents to believe that the news sources they use for free and the sources they pay for are reliable. According to the study, Democrats are far more likely than Republicans or independents to trust information they receive from the media (30 percent, vs. 8 percent of Republicans and 12 percent of independents).

Among those polled who said they pay for news, 73 percent of Democrats believe their paid sources are very or extremely reliable, versus 53 percent of Republicans, and Democrats are also far more likely than Republicans to believe the sources they subscribe to are a good value (45 percent vs. 30 percent).

Despite myriad differences in political opinion and exhibiting varying levels of trust in the media, the study found that people on both ends of the political spectrum share the same general appetite for news and tend to consume it in similar ways.

About the same percentage of Democrats and Republicans (58 percent vs. 56 percent) are likely to pay for news, both groups claim to seek news out actively rather than passively (68 percent vs. 65 percent) and both demographics claim to get news multiple times a day (72 percent vs. 71 percent).

Both groups are also equally likely (75 percent for each) to get news from social media, with both about equally likely to get news from cell phones (86 percent vs. 84 percent) and computers (66 percent vs. 65 percent). ○

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# Billing rates flat at many PR firms

Average hourly rates were down for PR professionals stationed across various agency staff positions last year, according to a new report issued by Gould+Partners.

By Jon Gingerich

Gould+Partners' latest report, which profiled billing rates and staff utilization at agencies by size, region and specialty, suggests most PR professionals didn't increase their hourly rates last year, and in many cases, actually lowered them.

Presidents and CEOs stationed at North American PR agencies billed at an average rate of \$354 an hour in 2016, compared to

\$355 an hour in 2015. The downturn appears among chief executive billing rates across the board: for agencies with less than \$3 million in revenues, CEOs billed an average of \$272 per hour last year (compared to \$301 in 2015); CEOs at agencies with revenues between \$10 and \$25 million billed \$379 per hour in 2016, compared to \$426 in 2015.

The exception to this trend seems to exist at the top. At agencies making at least \$25 million in net annual revenues, CEO billing rates averaged \$486 per hour in 2016, up from \$448 the year prior. Likewise, for chiefs stationed at agencies netting between \$3-\$10 million, average hourly rates were also up, from \$344 to \$360.

On the other end of the spectrum, billing rates were similarly down for many account executives. At agencies accounting for less than \$3 million in net annual revenues, average account executive billing was \$131 an hour in 2016, compared to \$137 in 2015. Agencies making between \$10 and \$25 mil-

lion saw average account executive billing rates of \$168 last year, compared to \$170 the year before.

Once again, however, account executives stationed at agencies making more than \$25 million in net annual revenues were outliers, and experienced an uptick in average billing rates in 2016, to \$177 from \$171 in 2015.

Average billing rates were also up widely for professionals stationed in senior/executive vice president and vice president ranks: senior and executive VPs billed an average of \$324 an hour in 2016, compared to \$315 per hour the year prior, and VPs billed \$273 an hour in 2016, versus \$269 in 2015.

The utilization rate among PR staffers, the metric by which productivity is measured, also remains below optimal levels across the board, according to the report.

Account executives are billing out only about 84 percent of their theoretical yearly capacity of 1,700 hours, according to the survey, compared to 89 percent in 2015. For CEOs — who typically see much of their time taken up with management and new business responsibilities — average utilization in 2016 was 33 percent, down from 36.2 percent the year prior. VPs revealed the only average utilization gains last year, billing out 67.3 percent of their time, compared to 67.1 percent in 2015. ○

## Trust in political parties tanks

By Jon Gingerich

GfK Verein's Global Trust Report, which polled residents in more than two-dozen countries on the levels of trust they place in various institutions, sectors and professions, found that political parties now comprise the least trusted bodies in the U.S. today.

Only 14 percent of U.S. respondents currently claim to trust political parties, compared to 23 percent in 2015 and 27 percent in 2013. Additionally, only 41 percent of U.S. residents now say they view the U.S. government as trustworthy.

Other sectors experiencing a recent trust deficit in the U.S. include the justice system and the church. Both of those categories accounted for some of the largest year-over-year declines in the study, with the church now trusted by only 69 percent of U.S. residents (compared to 74 percent the previous year) and the justice system now trusted by only a little more than half of all Americans (53 percent, an eight-percent decline from 61 percent in 2015).

Across the U.S.'s economic sector, telecommunication companies and Internet service providers saw considerable reputation slumps, now trusted by only about half of the population (51 percent). Pharmaceutical corporations have decreased by 14 percentage points, to 44 percent.

The media and international corporations / large companies also experienced big reputational dips, with the former falling six points and the latter eight points, with only 36 percent and 33 percent of the population, respectively, now claiming to trust them.

The media and large companies are now beat only by political parties as the least trusted institutions in the U.S., seen as less trustworthy than government, the justice system, the church or even the Internet. ○



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# Evolving ESG from burden to benefit

The issues, requirements and policies collectively known as Environmental, Social and Governance continue to evolve as the demands of regulators, business partners and investors grow. As a result, CFOs and compliance professionals are developing universal standards, common report formats and more robust data with specific metrics that go beyond policies of the past.

By Tom Faust

The real opportunity is leveraging the data and content gathered for a more expansive initiative that takes ESG from a financial and compliance box-checking exercise to a strategic component of corporate communications. This is especially true for private investment, asset management and other financial firms who often have more complex risk exposure around ESG due to diverse global holdings than single-industry businesses.

## Changing ESG demand

A significant driver of ESG's change came about as the "E" and "S" were added to what began as just governance. In the early days, this compliance function focused on the election of directors, voting standards and the separation of CEO and chairman roles. Governance is still critical, but has remained more of a procedural exercise. The focus recently has shifted to Environmental and Social as the public has grown much more conscious of and vocal about the actions of the companies they patronize, as well as the investors behind those companies.

Today, ESG is under intense scrutiny from all corners. Global stock exchanges are pushing listed companies for greater disclosure of ESG factors in investor reports. In 2003, barely 20 percent of S&P 500 companies reported ESG factors. By 2016, the number swelled to 82 percent. A similar change is happening on the private investment side. According to a 2017 report by Makena Capital Management, about 42 percent of investment firms polled had adopted ESG policies in 2016, compared to less than 5 percent a decade earlier. Furthermore, 66 percent of private asset managers said ESG is factored into their due diligence, regardless of whether a policy is in place.

We've seen the dramatic impact of ESG issues in corporate operations and investor decisions, such as divestment of interests in tobacco, fossil fuels and firearms businesses by private equity firms. Investment firms without robust ESG policies are increasingly at risk of being knocked out of consideration by major, global institutional investors ranging from state pensions and sovereign wealth funds responding to the pressure of the workers and citizens they represent, to corporate pensions concerned about reputational risk with consumers.

## The challenge of standards

The emergence of the UN Principles of

Responsible Investment has been a huge boon for IR and communications professionals who needed some north star to orient their ESG communications. Make no mistake; increased adoption of UN PRI is a real positive for the industry. However, a quick reading of the principles shows that there's a lot of wiggle room in the language.

For example, "We will incorporate ESG issues into investment analysis and decision-making processes." Certainly better than not incorporating them, but how are they weighted? What issues are considered? How does a firm think about the tradeoffs between different issues?

The lack of precision — by necessity — of the UN PRI language, has led to the current challenge of investment firms trying to satisfy dozens or hundreds of ESG information requests with widely varying data and formats. This not only makes life tough for compliance, it makes IR infinitely more complicated because the firm can't tell a cohesive ESG story. Reporting has its place, but for an issue with such huge stakes, financial firms can't rely on compliance-driven reporting to tell their story effectively.

## Expanded opportunities

As stated above, ESG presents an enormous opportunity for IR and corporate communications pros if they can look beyond what's required to what's possible. Investors are often more interested in seeing intent, effort and progress around ESG than actual (and sometimes arbitrary) numbers. There are several ways firms can make ESG more meaningful to financial audiences beyond the compliance function.

**Share the process.** As the Makena report shows, factoring ESG into investment decisions is easier than putting a policy in place. But that doesn't mean you can't say anything more on this complex challenge. Talk about the discussions that you're having internally about carbon footprint vs. labor conditions vs. data privacy vs. water usage. Show that you're engaged in the broader ESG conversation as the industry works toward common standards and your firm works toward a meaningful policy.

**Ally with experts.** As financial firms continue to incorporate ESG into their investment activities, questions remain on their effects on not only immediate returns, but their impact on the socio-economic and sustainability issues themselves. Partner-

ships with institutions, think tanks and consultants to co-authoring and co-sponsoring studies can provide third-party validation of a financial firm's commitment to ESG.

**Gather the data.** We recently worked with a private equity firm on enhancing its ESG story. Part of the process was looking at what its portfolio companies were doing. The results were surprising. From energy-saving environmental controls to ambitious recycling programs, waste reduction initiatives and green power mandates, the companies were doing more on ESG than the firm imagined. The firm was able to generate a number of compelling stories and some impressive metrics.



Tom Faust

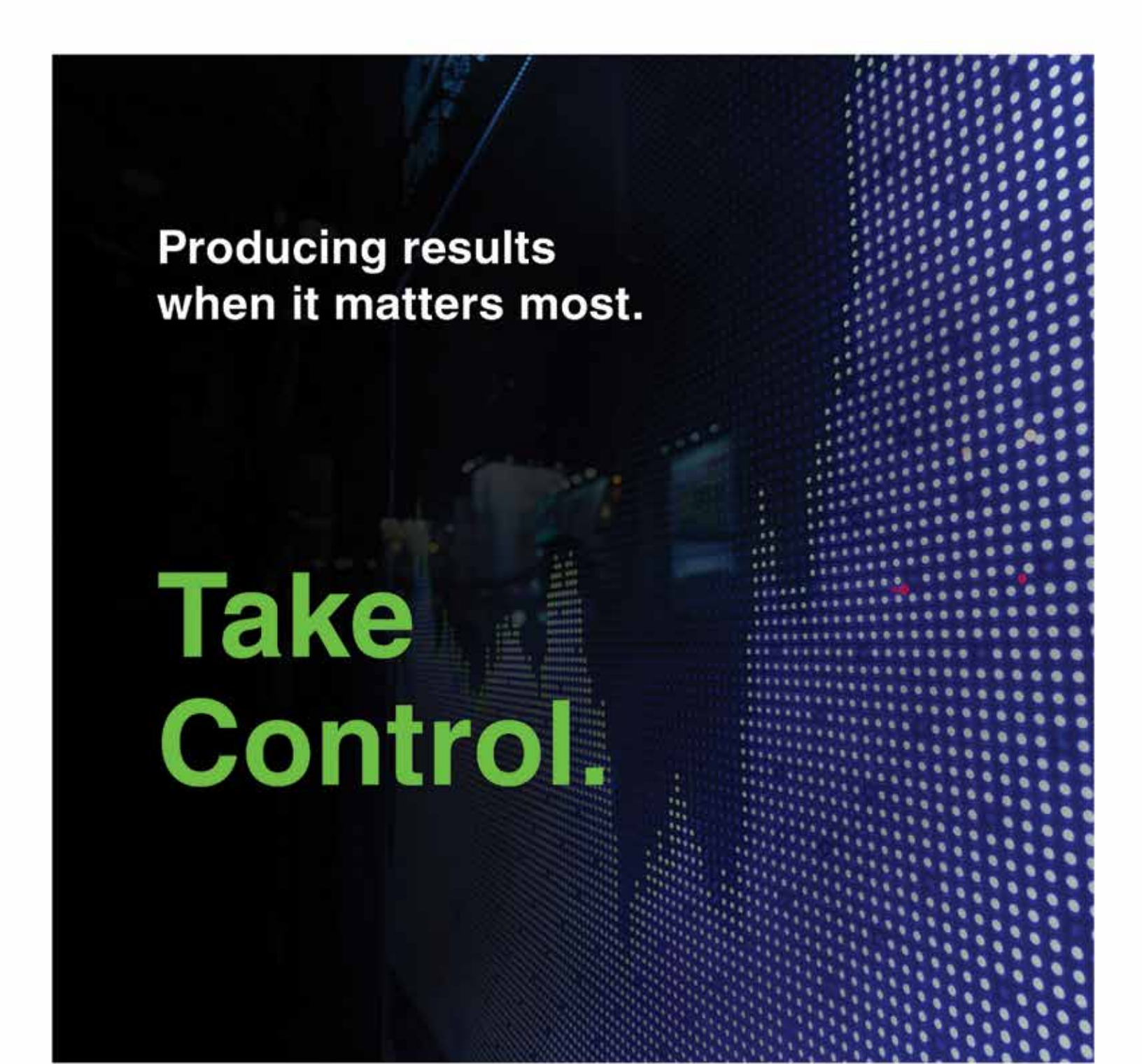
**Don't forget governance.** Every time a company in the public eye stumbles due to poor internal controls, lax ethical standards or conflicts of interest, governance is on investors' minds. This doesn't mean financial firms should send emails after every news story, but they should make selective use of such media attention to remind investors of the strong governance in place to ensure such situations are avoided.

**Raise your voice.** ESG can be a sensitive issue for many financial firms, public or private. Its birth in the compliance department means that, more often than not, communicating on ESG is restricted to an occasional letter to investors or expressed in eight-point legalese type. This is antiquated thinking. ESG is on the minds of media, the public and your investors. Forward-thinking financial firms want to be in front of the issue through a dedicated section of the website, discussion on investor calls, updates within or accompanying quarterly investor letters, and even direct engagement to get investors' input on how they are thinking about ESG.

While there are certainly compliance challenges to be overcome, ESG is no longer relegated to compliance or financial function. ESG holds tremendous potential for IR and communications professionals tapped with enhancing a financial firm's reputation, differentiating in a crowded market, and generating positive visibility.

Tom Faust is Managing Director at Stanton. ○





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# A better sense of storytelling

Despite regulatory restrictions, financial services companies are taking a more proactive approach to PR and marketing.

By Matthew Schwartz

When Peppercomm's senior PR executives initially met with financial services clients not too long ago they often would run into the same situation: Clients' marketing departments were siloed. Social media was separate from SEO or media relations was detached from digital marketing or — most worrying — IR from PR. It didn't exactly play into the integrated communications model that Peppercomm encouraged.

Rob Berick, Senior VP and Managing Director at Falls Communications, whose clients include several publicly traded companies, came across similar challenges.

"IR folks in-house often don't have at their fingertips multiple examples of their company's growth initiatives in action, which are the success stories," he said. "As a result, it can be a bit of a scramble for these companies to put their results in proper context for investors."

But in the last year or so, financial services brands and organizations have started to change their tune when it comes to PR and marketing communications.

"I'm definitely seeing the market evolving very quickly," said Jackie Kolek, Partner and Managing Director of Peppercomm, whose clients include Capital One, EY and Travelers.

"In many instances, companies are starting to break down silos and look across a paid, earned and owned marketing strategy."

Peppercomm now offers workshops, boot camps and other programs designed to educate financial services clients and IR executives how to optimize their message across multiple platforms, and stay within regulatory bounds. Clients have also started to ramp up investments for pilot campaigns, which don't eat up a lot of budget.

The trend is translating into addition-

al business. Peppercomm generated \$6.1 million in finance-related net fees in 2016, with an expected 15 increase this year.

"C-level executives want to know how to create a more integrated infrastructure internally, so we can drive more integrated brand messaging externally," Kolek said. "They're looking for guidance, and trying to understand the best communications practices in a regulated environment."

## More storytelling

Whether it's Federal regulations such as Regulatory Fair Disclosure or Sarbanes-Oxley — not to mention a slew of institutional rules that financial service companies must adhere to — IR executives have to contend with more guardrails than brands operating in less regulated markets.

In addition, digital technologies continue to have a dramatic effect on how investors gather and evaluate financial-related information, which, in turn, has led companies to sharpen their focus on compliance.

Despite the restrictions, IR/PR executives understand they must engage stakeholders or risk having their brand messages get lost in the shuffle or conceded marketshare.

PR agencies can demonstrate increasing value to financial services clients by helping them to connect the dots for constituents.

"There's more storytelling and education that needs to be done for investors about the distinctive or disruptive qualities a company has that will fuel growth," Berick said. "Investors need the context behind the results [and] companies often need someone on the agency side to integrate and curate those works streams."

"There's been an acceleration of interest in our services from financial services companies due to the increasingly competitive market for investment vehicles of all kinds," said Richard Dukas, Chairman and CEO of Dukas Linden Public Relations. "And that's true both on the institutional and retail sides of the ledger."

DLPR generated more than \$5.1 million in finance-related net fees in 2016, and is on track for at least a 10 percent hike in such fees this year.

## Follow the investor

Financial services companies are also bringing in PR firms to expand their reach into the burgeoning environmental, social and governance market, which caters to

socially conscious investors.

With investors taking a sharper look at companies' environmental and labor practices, for example, PR agencies are making sure nothing gets lost in the translation and investors are fully informed.

"We're looking for gaps within — and inconsistencies about

— a company's energy and labor policies and how that is being communicated in its CSR reports and financial disclosures," said Ron Loch, Principal and Managing Director of Sustainability Consulting at G&S Business Communications. "Investors are taking in all sorts of information about a company and if the overall message is not consistent from one marketing channel to another it connotes investor risk."

G&S, which reported 2016 net fees of \$1.6 million from financial accounts, is helping clients to create "scorecards" to stay on top of all the disparate issues encompassing sustainability, such as carbon emissions or alternative energies.

"Companies are just waking up to the fact that institutional investors in the U.S. care about these [environmental and social issues] and understand they need to break down the silos," Loch said. "The feeling previously was that IR has investors' needs taken care of, but now there's more impetus to involve IR with PR and marketing."

Matthew Schwartz is Editorial Director at Gould+Partners. ●



Richard Dukas



Rob Berick



Ron Loch



Jackie Kolek

## PR news brief

### Gatesman acquires Noble

Pittsburgh-based Gatesman is doubling its size with acquisition of marketing communications firm Noble Communications.


The deal boosts Gatesman's employee headcount to more than 125 and adds offices in Chicago and Springfield, Mo.

John Gatesman will serve as CEO of the combined entity, and Shannon Baker will remain president.

Noble Communications management team will remain in place as part of Gatesman.

Bob Noble will continue to lead The Food Channel, which was not part of the acquisition. His focus will be growing and expanding food publishing and Noble's food marketing, which remains in Springfield.





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# Corporate communications' risk-management role

Mergers, acquisitions and divestiture are some of the most challenging communications scenarios in the corporate lifecycle, and essentially grant corporate communicators a risk-management function.

By Dave Heinsch

According to Pitchbook, 2017 is shaping up to be a record year in terms of capital invested in mergers and acquisitions — the events that recast companies, industries, employee and customer and investor expectations — even brand identities. Mergers, acquisitions and divestitures are quintessential change-management events and some of the most challenging communications scenarios in the corporate lifecycle.

The moment a transaction is announced, risk is created, uncertainty is introduced, strategic rationale is scrutinized, first impressions are cemented and corporate culture and brand identity get ambiguous. To be clear, I am talking about strategic deals — transactions that fundamentally reshape the character of a company, rather than smaller “bolt-on” transactions. If you work for a public company, the sheer visibility of a major transaction makes all of this more intense. Ask a Whole Foods employee, vendor partner or investor how they felt when they learned about Amazon's takeover bid. “Did that just actually happen?” might have been a first reaction.

Through our investor and corporate relations work, we've led many clients through many transformative transactions and the role corporate communications plays is always an intriguing variable. M&A transactions are devised by top management, a small team of internal strategists, outside advisors and the board of directors. Ideally, executive management realizes the strategic value of having the corporate communications function involved right at the beginning. However, it's not uncommon that corporate communications is notified of the transaction when a deal announcement is imminent, which diminishes the important strategic impact it can have.

## Corporate comms as risk management

I believe the reason for this is that management sometimes views corporate communications simply as a dissemination mechanism. They don't immediately make the critical connection between communications and deal risk. Management teams are willing to take on additional market risk to create new opportunities. But they are equally eager to start mitigating that risk the moment a deal closes. In a transaction, corporate communications is, in every way, a risk-management function, one as important as any other risk-man-

agement dimension of a transaction.

The excitement of signing a purchase agreement and closing a deal quickly gives way to the pressure of “execution risk.” Can your organization pull off this new combination and deliver on the deal promise? Will this transaction be understood and embraced by your employees, communities, partners, investors and regulators? This entire concept of moving affected audiences from awareness to adoption is one of the largest sources of risk in a deal and is almost purely a function of communications.

Corporate communicators have a responsibility to educate management on their role in mitigating deal risk and demand to be part of the transaction team at the very beginning. Here are just a few examples of deal risk that communications must manage:

### First-impression risk

Management teams spend months, even years, developing M&A strategy and assessing potential transaction targets. At the time of the deal announcement, they are beyond steeped.

Unfortunately, perceptions of a transaction among most of your key constituents are cemented with the initial announcement, without the benefit of months of immersion into why this all makes sense. Even if a transaction won't close for several months, it's considered “virtually closed” in the minds of those affected upon that first announcement. If your organization is publicly traded, the market and the media weighs in almost immediately, and this has a big impact, positively or negatively, on how internal constituents perceive the deal.

Every aspect of your communications platform — key messages, responses to questions/objections/criticisms, ability to satisfy the WIIFM (what's in it for me) needs of affected constituents and your tactical approach to communications — need to be exceptionally well considered and mapped out. Then, you need to reinforce all of this up to and well beyond deal closing. Get it wrong, and you set the organization up for a difficult integration period.

### Message control risk

While they don't always take it, the acquirer has the right to control the overall approach and messaging in deal communications. Acquirers assume the execution risk after the deal closes. It's your obligation

and right as a corporate communicator on the acquirer side to make sure the communications program helps manage that risk — from the moment of the announcement through closing. You need to get clear insight into the nature and quality of communications used by the target company and pinpoint deficiencies and gaps.

### Audience-sophistication risk

Transactions, especially those in the publicly traded sphere, tend to get framed in the context of the strategic rationale, price multiples, leverage ratios and obtainable synergies. It's the arcane “deal-speak.” These measures mean everything to the capital markets.



Dave Heinsch

However, they mean much less to those constituents who power your business every day and who are operationally affected — employees, customers and partners. For the message of a transaction to resonate, corporate communicators need to find elegant ways to translate these concepts, to create a simple narrative that can rally audiences.

### Communications channel risk

Poor or inappropriate cascading of communications can needlessly create additional risk, by appearing to ignore the personal sensitivities and political realities that exist in any organization. The bigger the change for your constituents, the more they need to hear from you face-to-face. These are common sense, but often overlooked, and corporate communications needs to drive this.

Downstream message bearers play a critical role. Top-down communications is essential in a deal. But employees turn to their peers, their boss, the grapevine, business media coverage and social media to test the messages they are hearing from the top. A uniform message helps drive acceptance and engagement. Supervisors need to be prepared and coached to be advocates of the transaction. Moreover, they need to quickly identify and correct misinformation and false perceptions.

### Emotion risk

For employees, it takes time for the logic of a transaction to sink in, because it

— Continued on page 15



# Financial services communications post-crisis

Ten years after the subprime mortgage meltdown pulverized markets and brought the Great Recession, it isn't just the financial services industry that has fundamentally changed. How financial services PR firms communicate, who they communicate to, and the tools they now use to do it have evolved as well.

By Jackie Kolek

Even with markets now reaching all-time highs, uncertainty regarding how long the prosperity will last continues to loom. Knowing the customer, the audience and how the media landscape has changed is a key to rebuilding the areas of the financial services industry's reputation that haven't come all the way back.

## Landscape changed

In the aftermath of the Great Recession, regulators imposed rules on banks and other financial services firms designed to prevent the risky practices that many believe led to the crisis. Stripped of their ability to trade on their own behalf, dole out high-risk loans, or hold hard-to-value securities, most firms have had to cut costs while also fighting a credibility gap with a public that is sometimes still bitter about the past. Exacerbating that trust problem right now is a major demographic shift, in which millennials are stepping into the shoes of retiring boomers as the target customer for financial services firms.

## Trust and credibility

The challenge for financial services firms in communicating with Millennials is partly about trust and credibility. While most banks and financial services firms have recovered financially and then some, they've been slower to rebuild their reputations with Millennials. In fact, 71 percent of Millennials would rather go to the dentist than listen to their banks, according to the Millennial Disruption Index. In turn, many Millennials do as much of their banking as possible with start-up fintech firms, not only because of their lack of trust of the traditional players but also their propensity to do everything online.

Financial services firms have thus turned their attention to using social media to engage with their customers more and more, according to several recent surveys.

## Talent, talent, talent

The trust and credibility gap isn't just about customers, it's also about talent. Smart financial services firms also understand the lingering effects of the Great Recession on recruiting, retention and employee satisfaction. A Quantum Workplace study shows disengaged employees make 100 times more mistakes than other employees in financial services.

To that end, many firms have beefed up their employee communications, with so-

cial media being a major tool in that increase.

## Telling the broader story

FS firms clearly realize that their bottom lines came back much quicker than their reputations, especially in the financial press. However, most studies and surveys show that among Millennial customers and employees, loyalty is harder to build and easier to lose. The ones that understand the proliferation of digital channels, and how to get their message out to potential customers, employees and the media, are the ones that will be most successful in fully rebuilding their reputations, which have never fully re-

covered from the crisis.

It's not enough for financial services firms to have good earnings reports anymore. With so much increased competition from both fintechs and each other, they need to go a step further and show they're willing to engage with and empower the Millennial audience that is starting to rule the world.

Jackie Kolek is Partner and Managing Director at Peppercomm. ○



Jackie Kolek

## CORPORATE COMMUNICATIONS

— Continued from page 14

must work its way past emotion, which can impact morale and, therefore, the execution that needs to occur for a successful integration. Frankness, transparency, acknowledging that questions might come faster than answers, giving audiences a feedback channel and committing to regular updates on progress as the organizations come together can help them move through the emotion that surfaces with impending change.

## On the deal team, on day one

The excitement around a large transac-

tion is palpable. But you don't measure the success of a transaction on the day you announce it, or the day you close it. You measure it three years down the road — even five years — when your employees, customers, partners, investors and other audiences have embraced it and are reflecting the potential you believed possible. That's all a function of engagement, and effective communications drives it. The role of corporate communications is one of the most strategic and indispensable factors that turn deal risk into return and it belongs on the deal team, on day one.

Dave Heinsch is Vice President/Corporate and Investor Relations Lead at Padilla. ○

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# Integrated comms programs for financial services firms

Why a content-oriented approach and creative distribution strategies can help communications pros build and maintain financial services clients' brands in today's competitive marketplace.

By Bill Haynes

**T**raditional PR is dead. Media outlets have dwindled, while the number of public relations pros have proliferated. Companies, meanwhile, continue to value the role of PR in raising awareness and credibility. And their demands and expectations have only grown.

Differentiation is critical. Efficiencies are a must. Moreover, PR firms are being called on to measure their results and quantify for clients the returns on their investments. How do communications professionals best navigate this new communications landscape?

The evolution of the industry dictates that PR professionals should focus on integrated communications versus the strategies of earlier eras to simply accumulate as many media hits as possible. Integrated marketing efforts today, particularly in industries such as financial services, should feature strong content and creative distribution strategies to build and maintain their clients' brands, while driving new business.

For the most successful PR firms today, PR itself should just be one component of a far larger communications effort. Depending on the client's needs, firms should have capabilities extending from industry research and brand-messaging development to the creation of comprehensive outsourced marketing and communications plans. The latter should also leverage all the complementary tools available today to take companies' brand viewpoints to the market through an integrated program utilizing all available mediums and distribution channels.

## Creating a content foundation

In many respects, content lies at the heart of these efforts. Thought leadership demonstrates the expertise of the company and its senior executives and, at the same, the exercise of developing this material can help organizations improve upon and refine their messaging. Indeed, a company's content should start with compelling points of view on industry trends that connect in some way to their business. The content can be written in house or by an outside agency with experienced editorial capabilities. Many will find that beyond helping identify topics, research, and drafting the articles, outsourcing content-development providers can also impart an external perspective. This can be critical to avoid producing content that appears too promotional or biased.

Once the content is created, the value to clients can go a long way. We recommend, for instance, that clients host the thought

leadership on their website within their news and views section and send it directly in a branded email to clients, prospects and potentially others. Social media, particularly LinkedIn and Twitter, has also become a valued distribution channel through which to share content to drive website traffic and build brand awareness that positions the firm as a leader in its respective segments.

To be sure, many of the largest and most prominent firms have taken pains to develop their own content-development capabilities. BackBay recently conducted a study of the top 200 global asset managers to get a sense of best practices in content marketing. The study found that nearly nine out of every 10 — or 87.5 percent — produce some content regularly. Of those with capabilities in place, 50 percent generate new thought leadership on a weekly basis and 26 percent produce content monthly. In terms of the types of content, the largest firms also recognize the value of reaching different audiences through multiple mediums. Among content producers, 79 percent produce research, 89 percent offer regular market commentary, and 92 percent produce videos.

To get the most out of that content, most of the largest asset management firms leverage social media. In fact, 95 percent of the top 200 asset managers operate at least one social media channel, and more than four out of five are active on three or more. The top social platforms employed among investment management firms are in order: LinkedIn, Twitter, YouTube, Facebook, Google+ and Instagram. This is up from only 49 percent when BackBay conducted a similar study two years ago. Social media has become a nearly universal component of asset managers' PR strategies and represents a key tactic to distribute content and engage directly with clients and key audiences.

Those that produce content most regularly also tend to repurpose existing themes to get the most out of the effort. For instance, the work that goes into a research paper can be applied to other pieces. A number of asset management firms will often produce podcasts or host live webinars using the same content to engage with audiences in different ways. Others may redeploy data to create compelling infographics. From the audience's perspective, such a strategy not only reinforces the brand narrative and messaging but extends the runway and ensures foundational research or articles that generate interest months after publication.

Content marketing need not be confined to the world's largest firms. In fact, in asset management, whether firms have billions in assets under management or are far smaller, clients expect companies to share their points of view. For many mid-sized firms, a monthly or quarterly thought leadership article can frame the PR outreach for that time period. And articles can be emailed, placed in trade publications, distributed via social media, or be used for proactive media pitches.



Bill Haynes

For financial services companies in today's competitive marketplace, a strong brand is essential to sell products and services, raise capital, and grow a business. A brand must be based on a company's unique business, and delivered and experienced in ways that reflect its value proposition and competitive advantages. It should also be in sync with the needs of a company's key constituencies and aligned to their preferred methods of consuming information.

Often, articulating a firm's differentiated characteristics demands a more nuanced message. This is why integrated marketing campaigns, built around compelling content with unique points of view, can be the most efficient and effective way to build a brand. When this is coupled with digital delivery and strong relationships in the business press — which remain important — companies can control the narrative that shapes perceptions of their business and team.

A content-oriented approach requires communications professionals with financial services expertise to be effective. Together, a content-driven strategy and integrated approach to marketing enable greater consistency and efficiency of message dissemination than ever before, and provides a catalyst for client and prospect engagement that wasn't available to most firms even a decade ago. Ultimately, with an integrated, content-driven marketing campaign, communications teams can take a truly tailored approach in their campaigns and highlight the differences, value and distinct points of view of their companies in an increasingly competitive field.

Bill Haynes is President & CEO of BackBay Communications, [www.BackBayCommunications.com](http://www.BackBayCommunications.com). ●



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# Protecting your company from a cyberattack

Steps every company can take to strengthen and improve their security policy.

By Jerry Hutcheson

The average company today has an ineffective security posture, and this ineffectiveness is illustrated in many ways. The average cost of a cybersecurity breach is \$4.5 million, with losses potentially affecting privacy, company reputation, legal liability, market share and disruption of supply chains.

Studies of executives show that a loss of reputation remains a primary concern, with 85 percent of executives citing reputation as the most important factor, as reported in the *Harvard Business Review*. Even worse is when companies don't realize that these problems are occurring right under their noses.

## Passwords

Passwords are still a problem, because most people still have free reign to choose the passwords they like and remember. This leads to names, birthdates, pet names, spouse names, children — all of which are very easy to crack. Your password instead needs to be meaningless, it needs to be complex and it needs to feature a variety of characters. Today we have password manager programs that are an excellent opportunity to strengthen and secure all your passwords in one place. These password policies need to be implemented throughout the company and enforced.

## Physical security

This means to lock down the stuff on your desk, including your personal and work laptops, as well as your smartphone and any other network connected device. Companies are notorious for not locking everything down. Remember: you're as safe as your weakest point. Keep these devices stored in a safe place. The rule above regarding passwords also applies to smartphones and tablets: don't use "1-2-3-4" or your birthday as your unlock code. Lock your laptop if you get up to get a cup of coffee and you're only going to be gone 10 minutes; someone can happen by and maliciously install malware on this device and you'd never know it. There should be a policy for this spelled out and implemented throughout the company.

If someone can get their hands on a device they may be able to get inside it. Lock it up, put it in your desk, and lock your office door. This sounds basic, but it's not so simple. I worked for some of the largest IT vendors in the world and virtually every networking vendor had a way to access the device if they had physical access to it. A

man with an electrician's uniform can go up to most receptionists at most company offices and gain access to their electrical closet within minutes. Once inside, in the privacy of that closet he can break into any device. This means he owns your network, which means he owns your peace of mind. Lock it up, keep it locked and ensure your policies reflect this.

## Train your people

It can be easy to train people on proper security procedures and the proper ways to handle sensitive data. Train your employees to recognize attacks when they occur and to look out for other malicious players in your midst. More than half — 60 percent — of all attacks originate inside of your network. It's not too hard to have simple policies and procedures that instruct employees on how to look for suspicious behavior and to have a clean and effective way to report it. You need to be able to audit the training results carefully on an ongoing basis to make sure it's being effective.

## Cybersecurity needs to be a priority

The way cybersecurity is communicated to a company's user community often involves a lack of focus. Security needs to be a priority and it needs to be a priority from the top down. Verizon's Annual Threat Report showed 65 percent of corporate executives believe data security is a top priority. Leadership should lead by example to show they've made cybersecurity a primary concern. This PR effort is internal and critical to your cybersecurity. Note that process and not technology are the key commonalities.

## A strong security policy

I used to enter clients' environments to evaluate their security, and I'd ask if they could show me their security policy. Most of the time I'd get sheepish looks and embarrassed smiles, but no actual security policy. Studies have shown that about 38 percent of companies admit to not having any security policy at all, and I believe that actual number is much higher. Have a strong security policy. It should be driven and supported by the executive level; otherwise it will mean nothing. This is the root of successful security posture.

## Test your security

If you think you've put together a rock-solid security policy, you need to be sure of it. This requires testing and evaluation by an objective third party you can trust, not your internal IT department which has a vested interest in proving that your current securi-

ty posture is just fine. As principal of a corporation, your job is to deal with the possibility of failure. This is the only way to know for sure, short of having an actual breach.

## Demand excellence from security pros

It doesn't matter if your security professionals are your in-house IT people, or a security contractor, or a security products vendor. You need to ensure there's an environment of excellence from these providers. You need to communicate to them that you expect the serious concrete results laid out, on paper. You need to make sure you have in place the policy that demands specific performance objectives. There should be metrics to measure your people on these criteria. You don't need to be a security or technical expert yourself, but you definitely need to communicate your expectations. And you need to see regular, executive level reports to verify this.



Jerry Hutcheson

## Have a plan

Be ready for the attack that will inevitably come your way. This is not an eventuality — it's unequivocal. Be ready to respond quickly and cleanly. This can be the difference between an attack and a major breach that lands you on the front page of the newspaper. The first is a problem; the latter is a catastrophe. And this cannot be emphasized enough: a major breach is what we're ultimately trying to prevent. The exposure in the media can be intense, so be prepared with your response.

## Do something

This may sound simplistic but it's not. A large number of executives leave the decisions regarding what's going to happen to their security posture up to subordinates. Even worse, it's basically left up to the hacker to decide which direction you're going to take. Place your future into your own hands; it's not that complex with the right help, and the right path to get you there is a very real and achievable objective. These are all process issues above, and a better process is where it will be fixed. You should take action immediately, because the cybercriminals are working on it today.

*Jerry Hutcheson is a writer, public speaker and consultant. His company Cybercreed Consulting helps company management and executives protect themselves from cyber-attack. He has a book coming out shortly titled "One False Click: How to protect yourself in the coming cyberwar." [www.jerryhutcheson.com](http://www.jerryhutcheson.com).* ○





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# Forget pay-to-play, it's click-to-play that counts

The media's rapid evolution from print to desktop to mobile has changed not only our news habits but the nature of what's reported, testing financial PR firms' focus, strategies and approach to media relations.

By Matt Zachowski

**L**ike every area of communications, financial PR is being challenged by ongoing pressures facing its traditional outlets: mainstream and trade print media. Advertising revenue continues to be lost to the Internet while readers disappear due to the meteoric rise in popularity of social media.

With many publications consolidating their print and online businesses, going online-only — or even going out of existence entirely — the core media relations business of financial PR firms is being severely tested by the sharp reduction in publications, coverage areas and journalists that are available to their clients.

## Mobile on the rise

Driving this accelerating change is the rise in mobile consumption of media. Forget about the Millennial generation and all of those thereafter, few of whom will ever look at a print publication in their lives. Even most of the Baby Boomers I know get most, if not all, of their news online at this point. I was particularly struck last month during a conversation with a former *New York Times* overseas bureau chief who had worked in global hotspots like Moscow, Beijing and Cairo, now approaching 80 years of age, when he told me he gets all his news on his iPad each using mobile applications from mainstream print publications. The shift from print to desktop to mobile consumption of media is clearly happening much faster than any of us expected.

Steadily improving mobile applications and smart algorithms are now making long-promised mass customization of media product a reality. Today, we all get our morning emails from the *Times*, the *Journal*, the *Financial Times*, the *Washington Post*, *Politico* and many others, with the day's news carefully curated for us based on the clicking behavior of their online readers.

Facebook shows us the news based on our posts and “likes,” and Google now provides us with “feed,” a news app based on our location and Internet searches. While all the bots watch us, journalists now watch Twitter for breaking news, rather than the other way around. Entire governments have even fallen in part because of so-called “Twitter revolutions” and smuggled videos posted on YouTube. Social media is

not only popular, but powerful.

The rapid move to mobile and social has not only changed our habits but it has changed the nature of reported news. Even the Old Gray Lady and WaPo under Jeff Bezos have reorganized around an “online first” news reporting strategy, going where their audience is. This equates to headlines and photos in their morning briefs that tease rather than tell the story, serving as clickbait to the website where the opposite is true: the headline and the lede tell all, stories are truncated with links to related content, and short videos abound. No surprise, really, that both publications have seen a bump in digital subscribers following these changes. Meanwhile, the trade publications that haven't disappeared are merging and consolidating staffs through “synergies,” which typically translates to fewer people doing more work.

In this new world order, the opportunity to provide quality material in the form of sponsored articles to content-starved publications has increased, as has the ability to disseminate it directly to your audience via social media. Many financial PR agencies have shifted their focus away from traditional media relations as a result of these developments. If you can go directly to the market with your client's message, they reason, why go through the filters of reporters and low-level editors? Many of these journalists are younger and less experienced than those of generations past and are not yet fully conversant with all the subtleties of financial markets and products, fintech, in particular. To many agencies, traditional media relations just doesn't work anymore.

## Mainstream media remains credible

We reject this line of thinking. Even as mainstream media takes it on the chin from President Donald Trump — quite literally in the case of CNN — these outlets remain far and away the most credible sources for news and information to well-educated business and professional audiences. In a sea of sources, many of which look and sound alike and have “innovative” business models that don't involve revenues, whom do you trust as a reader? As a recent detailed survey by Pew Research Center showed, it is those fabled purveyors of “fake news”: the mainstream national and business media. About 8 in 10 respondents

said they trust the information they get from mainstream media “somewhat” or “a lot,” versus only 3 in 10 respondents who said the same about information obtained from social media.

Recently, one of our fintech clients had a brief but prominently placed article in the *Financial Times* on the firm's latest funding round. From that single bit of coverage, the company got several thousand website referrals directly from the *FT* website or mobile app, translating to more than 500 qualified leads. This was roughly 10 times the number of qualified leads that our client received from any of the 15 other publications that ran a similar story or from social media postings. This example demonstrates the power of online and mobile coverage in traditional mainstream outlets, which are highly respected in the marketplace notwithstanding anything the President might say. It also shows how the Internet has sped up the sales cycle right along with the news cycle and just about everything else.

## A changing approach to news

In the rapidly-evolving online world, crowded with so many niche and social outlets, mainstream media still own many of the most powerful brands in the market, boosting their credibility and engendering trust. And short of staff, they are more than open to hearing your pitches. But their approach to reporting the news is changing, so PR firms must change their approach as well.

It has never been more important to think like an editor rather than a marketer. If you can't tell your client's story in a headline and a couple of bullet points, you need a new narrative. If you can't supply an interesting photo or infographic that supports your pitch, you need a new narrative. If it's not about what your client is doing for the reader, you need a new narrative.

As James Carville might have put it, “It's the clicks, stupid.”

Matt Zachowski is Managing Partner and Executive Chairman at Intermarket Communications. ○



Matt Zachowski



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# Q2 earnings mixed bag for ad/PR congloms

Second-quarter earnings were a mixed bag at the big ad/PR conglomerates. Interpublic and Omnicom recorded revenue declines as clients adopted a more cautious approach in spending in anticipation of the eventual roll out of President Trump's economic plan. Publicis Groupe and Huntsworth showed gains due to corporate revamps, while WPP benefited from solid growth in the UK.

By Kevin McCauley

## PG's net tumbles as revenues slip

Interpublic in July reported a 39.6 percent drop in second-quarter net income to \$94.7 million as revenues dipped 1.7 percent to \$1.9 billion.

IPG shares, which hit a 15-year high July 24, dropped more than 10 percent to \$22.92 on the earnings news.

The constituency management group, which includes Weber Shandwick, DeVries Global and Golin, reported a six percent dip in revenues to \$347 million and a 2.2 percent slide on an organic basis.

Andy Polansky, CEO of Weber Shandwick, noted the performance followed high-single growth on as-reported basis and mid-single organic growth last year.

Weber Shandwick reported gains in Europe and Asia during the first-half with healthcare robust and an uptick in employee engagement and corporate consulting services, according to Polansky. DeVries showed nearly double-digit organic growth, while Golin registered mid-single digit organic growth during the first-half.

"Client spending in the quarter reflected increased caution, but we don't see evidence of a broad-based economic downturn," said CEO Michael Roth of the financial results.

He's confident the ad/PR conglomerate's investments in digital expertise and data-driven/technology-enabled marketing will help it achieve the low-end of its three to four percent organic growth target for the year.

First-half organic growth clocked in at 1.5 percent overall and 1.7 percent in the US.

Roth said IPG would remain "highly focused on costs, in order to build on our strong record of driving margin improvement."

## Publicis posts Q2 revenue rise

Publicis Groupe CEO Arthur Sadoun in July reported a 2.2 percent rise in Q2 revenues to \$2.9 billion at the France-based ad/PR conglomerate.

First-half revenues jumped 1.9 percent, a period that Sadoun described as "particularly dense" due to moves to revamp corporate governance and roll "The Power of One" strategy designed by predecessor CEO (now chairman) Maurice Levy.

Improving organic growth is Sadoun's number-one priority. Organic growth clocked in at +0.8 percent during Q2 with North America returning to positive terri-

tory. It slipped 1.2 percent during Q1.

Organic growth during Q2 benefited from gains from accounts won during 2016, including Walmart, Motorola, USAA, Asda and Lowe's.

Publicis expects "sequential improvement" in organic growth during the current quarter.

Sadoun said Publicis is at the beginning of implementing an action plan. He promises a "concrete and articulate update" during the coming months.

## OMC's Q2 net inches up on revenue drop

Omnicom Group posted a one percent rise in Q2 net income to \$328.6 million on a 2.4 percent drop in revenues to \$3.8 billion.

The PR group led by Ketchum, Fleishman-Hillard and Porter Novelli registered a two percent drop in revenues to \$342.6 million.

CEO John Wren reports that overall organic growth charted a 3.5 percent rise led by advertising (+4.2 percent), CRM (+3.7 percent) and special communications (+2.2 percent). PR failed to keep pace, declining 0.3 percent.

Omnicom's North American revenues dropped 6.6 percent to \$2.2 billion. Continental Europe rose 5.1 percent to \$662 million, the UK plummeted 3.7 percent to \$350 million.

## Huntsworth enjoys healthy half

Huntsworth recorded a nine percent growth in revenues to \$122.5 million during the first half paced by a robust performance of its healthcare unit and the return to profitability for Grayling.

Pretax profit surged 58 percent to \$13 million.

CEO Paul Taaffe said Huntsworth Health remains the firm's focus for growth and investment as clients "seek a more differentiated and increasingly digital offering for their medical and marketing communications."

Huntsworth Health added The Creative Engagement Group experiential marketing operation in an acquisition worth \$35.5 million this month to strengthen its digital creativity expertise.

Grayling swung from a slight loss to \$500,000 profit despite a 13 percent drop in revenues to \$27.3 million.

Europe, which accounts for 70 percent of Grayling's revenues, Middle East and Asia operated in the black while the US posted red ink.

Taaffe anticipates the US would be profit-

able beginning in 2018, buoyed by its Washington lobbying office and a PR business transitioning to a broader client portfolio.

Citigate Dewe Rogerson financial unit showed a two percent revenue dip to \$14.2 million. Slowdowns in Greater China (14.4 revenue plunge) and Singapore (nine percent drop) hurt CDR, which reported an overall \$1.9 million profit.

## WPP reports revenue, profit up

While WPP doesn't report its interim half-year results until late August, the British conglomerate at an annual general meeting in June reported that revenue (Jan.-April) rose 15.9 percent to \$6.3 billion, while profit ran "well above budget and ahead of last year," according to WPP CEO Martin Sorrell.

The PR/PA group (Finsbury, Burson-Marsteller, Hill+Knowlton Strategies, and Cohn & Wolfe) was up 5.8 percent in revenue on a constant currency basis, off a tad from the first-quarter.

In April, WPP's PR/PA unit registered "very strong growth" in the UK with Continental Europe and Asia slightly weaker.

North America ranked as WPP's weakest region as four-month revenue slipped 2.7 percent. Advertising, media/data investment management and parts of healthcare slipped for the period. PR/PA, branding & identity, digital, eCommerce and shopper marketing businesses were up.

Sorrell sees brighter prospects in the US under the Trump Administration, "which is clearly much more strongly pro-business, and much more business-connected than the Obama administration."

He cited Trump's "planned pro-growth tax, infrastructure investment, spending and regulatory reform, although implementation has been delayed."

Due to the low-inflation environment, Sorrell said there's considerable focus on the short-term and cost. "Finance and procurement functions are dominant, certainly equal or more powerful than marketing, rightly or wrongly, and the siren calls of consultants suggesting cost-based solutions," said Sorrell.

At the annual general meeting, 21.3 percent of shareholders voted against or abstained on Sorrell's \$62 million compensation package. The vote against Sorrell's pay was smaller than the 34 percent tally last year. ○



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## Peter Osgood, ex-Byoir and H&K, dies at 76

**P**eter Greer Osgood, 76, Vice Chairman of Hill & Knowlton from 1986-91 after serving as president/CEO of Carl Byoir & Assocs. from 1983-86, died July 22 in Sedgwick, Me.

He helped H&K to expand its international offices including opening the China market and expanding offices in the Middle East, Latin America and Russia.

Most of his career was spent at Newsome & Co., Boston, which he joined in 1962. He was president from 1975-82.

Virgil Scudder, who headed MediaCom, the media training unit of Byoir and H&K, said Osgood helped establish media training as an important industry service.

"Peter was a good leader, colleague, and mentor who always displayed a pleasant demeanor and a positive outlook," said Scudder. "His strong support of the MediaCom unit that I headed was instrumental in its success at Byoir and led to the unit being incorporated intact into H&K when Byoir was bought by H&K. We continued our relationship after each of us left H&K to form his own company."

He was Managing Principal in the Osgood Global Group from 1991-94.

A native of Waltham, Mass., Osgood received a B.S. from Syracuse University in 1965. He was the founding president of the Boston chapter, National Investor Relations Institute, in 1970 and chaired the Counselors Academy of PRSA in 1977-78. He also resided in Wellesley, Mass., and Darien and Fairfield, Conn. ○



Peter Osgood

## Uber alum books ride to Facebook

**R**achel Whetstone, who stepped down as VP-Communications and Public Policy at Uber in April, is joining Facebook in September in charge of PR for its WhatsApp, Instagram and Messenger products.

She will report to Caryn Marooney, VP-Global Communications.

Whetstone joined



Rachel Whetstone

the car-sharing company in 2015, replacing former Obama advisor David Plouffe.

Facebook CEO Mark Zuckerberg recruited Plouffe in January to run the Chan Zuckerberg Initiative, a social advocacy organization. CZI was formed by Zuckerberg and his wife, Chan, to give away most of their FB stock to groups that "advance human potential."

Before Uber, Whetstone did a ten-year stint at Google, where she handled PR and the search engine's relations with the European Union and Federal Trade Commission.

The UK native began her career in Conservative Party politics, advising then-Home Secretary Michael Howard. ○

## Motherway moves up at Booz Allen

**B**oaz Allen Hamilton upped Mara Motherway to Head of Government Relations.

She served as business development executive for BAH's military intelligence business. Before joining the firm, Motherway led business development and strategy at BAE Systems.

In her new position, she is responsible for strengthening BAH's relationships across the federal government and providing input on public policy issues.

A retired U.S. Naval officer and a graduate of the U.S. Naval Academy, Motherway brings nearly 25 years of government and private sector experience to her new role. ○



Mara Motherway

## DeShong checks in at MGM Resorts

**M**GM Resorts International hired Debra DeShong as VP-Global Industry Affairs based in its DC outpost.

She's in charge of media relations and messaging strategies for the destination resort chain that runs properties such as the Bellagio, Mandalay Bay and MGM Grand (Las Vegas), National Harbor (Oxon Hill, MD) as well as a 56 percent-owned venture in China.

Most recently, DeShong was Executive



Debra DeShong

VP/Managing Director for PA at Subject Matter in Washington.

Earlier, she was Chief of Staff for US Ambassador to Japan Caroline Kennedy, Co-Founder of Point Blank Public Affairs and Founder of Five by Five Public Affairs

She also held communications jobs at the United Nations Foundation, staff of former New Jersey Senator Bob Torricelli, Democratic National Committee and the Kerry-Edwards presidential campaign. ○

## APCO Appoints Ardel to Co-Lead Crisis Practice

**R**obert Ardel, Managing Director of APCO Worldwide in Germany, has been named Co-Leader of APCO Worldwide's global crisis management and litigation communications practice.

Ardelt, who's filled the Managing Director post at the independent global communication agency for more than seven years, will now co-lead Washington, D.C.-based APCO's crisis and litigation communication practice, which operates in more than 80 local markets worldwide.

Ardelt will lead a team of crisis and litigation consultants with Executive Director Kent Jarrell, who is based in Washington.

Prior to joining APCO, Ardel was a Marketing and Communications Manager at global strategy consulting firm Booz & Company (now PwC's Strategy&). He was previously a Senior Associate at Burson-Marsteller. ○



Robert Ardel

## Day becomes B-M UK CEO

**B**urson-Marsteller named Stephen Day CEO of its UK operations. Day, who succeeds Amanda Pierce, joined the firm in 2014 as Managing Director, UK Practice Chair, PA and Political Communications. In 2016, he assumed COO of UK responsibilities. He started his career working for the Conservative Party's Front Bench Trade and Industry Team. ○



Stephen Day



# Leveraging social to get your products coverage

Social channels provide a great forum to find and pitch targets, and an effective way to secure coverage for your products.

By Curtis Sparrer

As a marketer for a business, you should be using social media to connect with and pitch products to journalists. According to Cision's 2015 Global Social Journalism Study, two-thirds of journalists use social media each day, and 23 percent also accept pitches they receive via social media.

Social media provides a personal space to find and pitch targets, and an effective way to get great coverage for your products. Here's how you can leverage social channels to successfully secure that coverage.

## How to find targets via social channels

This tactic isn't anything new. All marketers use social channels to find targets to pitch. However, there are some effective ways you can find them.

**Search hashtags.** Some journalists get on Twitter and Instagram and search hashtags to find people who are talking about similar products to theirs or keywords related to their product. The only problem with this is that searching a hashtag is going to pull up a lot of posts, and then you have to manually search to find posts published by professionals who have the right kind of social following.

**Utilize Twitter's public profile information.** Twitter's public profile information is another way you can use this social channel. Many publications, such as Huffington Post and Forbes, have public lists on Twitter. You can find these lists by doing a Google search, such as "Forbes list members on Twitter," or on Twitter's site on a new site's profile. Most news sites have a section for "Lists" next to the "Likes" feature; you just might have to click the "more" button, which is where you'll find their list of editors and contributors along with their bios.

Using this feature lets you easily and quickly find the right individuals with the publication connections you're wanting for the right kind of coverage.

"Using social media makes finding and connecting with news editors quick and easy because it allows you to get hyper-targeted quickly," said Greg Shuey, co-founder and managing partner at Stryde. "You can send out product pitches to numerous outlets. The biggest challenge becomes pitching them on coverage."

**Use social tools.** There are also tools at your disposal to help automate tasks. In this case, BuzzSumo and Upfluence are two mechanisms you can use to find, analyze,

follow and reach out to different people via social channels.

## How to effectively pitch products

Just as there are effective ways to find individuals to pitch your products to, there are effective ways to pitch your products. Here are a few suggestions on how to go about pitching products.

**Establish a good social media rapport.** Journalists' inboxes are flooded with pitches every day with names they don't know. Once you find someone to pitch your product to via a social channel, build a rapport with them via said social channel. Don't be a stalker, but follow them on Twitter, and interact with some of their posts (i.e., like them, reply to them, and/or retweet them). Doing this regularly over time will get that person familiar with your name, so when you do pitch them, they recognize your name and will be more inclined to open and hear your pitch.

**Pitch a story, not your business.** This may come as shocking, but to people who receive dozens to hundreds of pitches each day, your business and product aren't interesting topics. But when you present them as part of a bigger story, then you'll get their attention. Storytelling is a powerful tool to position your product in pitches — when done right. Doing it right involves having a good strategy, having a good story, visualizing your story, and then powerfully sharing your story to whomever you're pitching.

## 'Failing' NYT moves into the black

The New York Times Co. moved into the black during the second quarter, posting a \$15.6 million net income, up from a \$211,000 red ink performance of a year ago deficit.

Operating profit grew to a \$27.7 million, up from \$9.1 million in 2016. Revenues jumped 9.2 percent to \$407.1 million.

CEO Mark Thompson said NYTC registered a "strong quarter" in which it grew revenue and profitability and made "significant changes to ensure that the acceleration of our digital business continues in the long-term."

The Times cracked the 2 million digital-only news subscriber mark during the period. Digital-only subs rose 69 percent to the \$2.3 million level.

Revenues from digital-only news products jumped 46.4 percent to \$82.5 million.

Some businesses have found that using video with their pitch has been effective at storytelling. Just look at how well Purple Mattress' video tells a story.

**Don't tell them your story is unique.** If you start a pitch saying your story is unique and they have to read and share it, most pitch receivers are going to delete your message right then and there. In all honesty, with all the people and businesses in the world and all the pitches that person receives, your story may not be as unique as you think it is. Plus, if you say it's unique and they give you the benefit of the doubt and read on, only to find that your story isn't unique, it'll discredit your whole pitch. You should never have to tell someone your story is unique or that your product is the most amazing thing on the market since sliced bread. If your story is really unique, your target will know it.

**Get right to the point.** No editorial professional or journalist likes getting buttered up. They don't have time to sit and read through chit chat or how this is going to be such a mutually-beneficial relationship, either. They know why you're pitching them, and the best products and pitches can be given in a few sentences. Don't beat around the bush. Get straight to the point, and remember that when it comes to PR pitches, less is more.

Curtis Sparrer is Co-Founder and Principal at Bospar. ○



Curtis Sparrer

Digital advertising jumped 22.5 percent to \$55.2 million sparked by increased revenues from the smartphone, programmatic and branded content segments.

Print advertising continued to fall, dropping to \$77.1 million as the luxury, real estate, telecommunications, technology and travel categories registered declines.

The Times had an \$11.9 million charge for streamlining the company's overseas print operation and an \$11.7 million write-off for a partial withdrawal obligation under a pension plan. Severance costs weighed in at \$19.3 million.

Thompson expressed optimism for the future. "We believe that more and more people are prepared to pay for high quality in-depth journalism that helps them make sense of the world," he said. ○

# O'Dwyer's guide to FINANCIAL PR & INVESTOR RELATIONS



**Butler Associates earned PRSA-New York's highest honor, the 2016 Best Business / Campaign Outcome award, at the industry group's annual gala in the Mandarin Oriental Hotel in Manhattan.**

Photo credit: PRSA-New York

## BACKBAY COMMUNICATIONS

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BackBay Communications is an integrated public relations and content marketing firm focused on the financial services sector, with special expertise in private equity, asset management and fintech.

BackBay is known for helping companies develop strong brands and raise brand awareness through thought leadership, media relations, research and message development and integrated outsourced marketing campaigns. BackBay has very close relationships with major business and trade media. With fifteen employees and offices in Boston and London, BackBay serves companies across the United States, Europe and elsewhere, leveraging global partners.

BackBay takes a brand-centric,

content-driven approach to developing and executing market positioning and integrated communications programs for financial services firms including marketing strategy, content development, creative design and multi-channel distribution of company news and perspectives to build brand awareness, credibility and drive new business for our clients.

Our services include public relations, branding, website development, marketing materials, videos, advertising and social media.

Our industry work and experience includes: Accounting/Advisory, Asset Management, Banks, Financial Technology, Hedge Funds, Insurance, Legal, Private Equity, Venture Capital and Wealth Management.

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Beehive Strategic Communication is best known for fresh insights, creative strategies and positive connections that create enduring value for our clients.

We are inspired by the global movement toward purpose-driven businesses and are committed to using the power of communication to build better businesses for a better world.

Beehive works nationally on behalf of leading brands in industries ranging from healthcare and education to retail and financial services. Our expertise includes research, communication strategy, brand positioning, employee engagement and internal communication, public relations, social and digital marketing and crisis communication.

Our team of senior strategists has extensive financial services experience with brands including Associated Bank, CU Companies, DCM Services and Deluxe Corp.

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**Thomas P. Butler**, President

Butler Associates is the winner of the PRSA NY's 2016 Best Business / Campaign Outcome and 2016 *PR News*' Agency Elite awards for its high-level winning communications campaigns. Serving clients since 1996, our firm provides strong, effective corporate, financial, legal, crisis and public affairs strategies that have positive, lasting business building impacts.

Our advocacy has had strategic impact for shareholder campaigns, CEO-level messaging and highly visible corporate litigations. Butler Associates is known for developing key messages and relationships that effectively build and sustain our clients' reputation and brand.

Butler Associates continually achieves significant visibility, spotlights corporate and financial leaders, leads or supports winning campaigns and delivers clear and crisp communication strategies and messaging for a diverse range of clients.

The Butler team includes seasoned professionals who are committed to their clients and deliver consistent, measurable results.

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includes the development and execution of high-impact communications campaigns for such financial services clients as: American Institute of Certified Public Accountants (AICPA), CapGemini (Financial Services practice); DealerTrack, Fiserv, Guardian Life Insurance Company of America, Jackson Hewitt Tax Service, J.P.Morgan, National Association of Insurance Commissioners (NAIC), S1 Enterprise; TD Bank and analyst firm TowerGroup.

Our expertise encompasses both B2B and B2C offerings and outreach, and extends across a spectrum of services. Clients leverage our award-winning team for needs including: brand positioning, media relations, industry analyst relations, digital / social strategy and execution, social community management, content marketing, advertising, video production, collateral materials, design; and more.

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Dukas Linden Public Relations (DLPR) is a communications partner for leaders in finance, asset management and professional services. We create compelling narratives that expand our clients' share of voice, enhance their brand value and — most important — engage key audiences in a global marketplace.

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We serve clients globally through our strategic partnership with MHP Communications, one of the U.K.'s ten largest PR firms, with offices in London, Frankfurt, Hong Kong, Singapore and Sydney.

DLPR's clients include both well-known and emerging companies in key areas of finance, including: mutual funds, ETFs, wealth management, hedge funds and private equity, institutional investing, and investment banking. DLPR also has a strong professional services practice, representing firms in law, accounting, insurance, compliance, risk management and management consulting. DLPR also has strong experience in fintech and B2B technology, and recently launched a dedicated technology practice.

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provides true integrated financial communications services to public companies and those seeking to go public. We have a sophisticated understanding of the intersection between investor and public relations and work with our clients to bridge any gaps between them. Our senior team helps companies to mine their business assets for "The Street" and financial/ business accomplishments for the trade.



**Richard Anderson, Senior Managing Director, Financial Services, Feintuch Communications**

The firm has a particular expertise in counseling companies in crisis situations involving the SEC, DOJ and other types of government investigations. We provide strategic IR services in-house and partner with best-of-breed providers to deliver a full IR platform including corporate positioning, institutional and sell-side targeting, IPO consulting and road shows, conference call preparation, shareholder letters, M&A advice, speaking platforms and more. We also help privately held companies tell their stories to the financial media.

Financial practice head Rick Anderson is a former chair of PRSA's financial communications section. FC is a founding member and our principal is vice chair of PR World Alliance, an international alliance of premier independent PR and IR consultancies.

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**Moirá Conlon, President**

Financial Profiles is a strategic communications firm that specializes in creating client value in terms of reputation, valuation, capital, talent or other measurable results. This year marks the 10th anniversary of the firm, which was founded in 2007 by a group of recognized industry professionals with deep knowledge of communications, finance and journalism.

Financial Profiles partners with public companies, pre-IPO companies and asset management firms for strategic counsel and advice, expertise in value-based corporate positioning and messaging, and access to investors, analysts and the press. The firm offers a range of specialized services including fully outsourced and project-based investor relations, IPO preparation, M&A support, strategic advisory services, corporate positioning and narrative, media training and media relations and crisis preparation and management.

The firm has a track record of success in leveraging smart counsel and best-in-class communications to help companies differentiate and distinguish themselves, enhance their credibility, and build Wall Street and media support that leads to growth and access to capital. The firm takes a research-based, customized and proactive approach to each client engagement, and nimbly applies the best talent for each client need from a diverse set of skills and expertise with the goal of achieving measurable ROI. This has led to long-term client partnerships, repeat business and referrals.

Financial Profiles' distinct and successful financial services practice serves banks, REITs, specialty finance and insurance companies, as well as asset managers. The firm also works with companies across a variety of sectors, including consumer, outsourced services, industrials, energy, technology and healthcare services, and has substantial experience with companies in newly established categories, sectors or asset classes.

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G&S Business Communications knows the value of a reputation based on trust and performance. We provide financial and business services clients with strategic counsel to give products and firms the leading edge in a high-stakes marketplace.

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**Steven Stoke**, Managing Director, Interactive Productions  
**Ray Hennessey**, Chief Innovation Officer

JConnolly is a communications and marketing agency with offices in NYC, NJ and Chicago. With public relations at our core, we transform our clients' businesses and brands by giving them our best on two critical fronts: as communications professionals at the cutting edge of the industry and as individuals who care about the health and well-being of our relationships.

We partner with brands to help them expand awareness, connect and engage with clients and stakeholders, influence change, amplify online presence and build community. We design and execute campaigns that are mission driven to deliver business-critical results. Our capabilities include a mix of public relations, content, video, social and crisis communications.

The clients we serve are financial organizations, highly regulated companies, high-profile executives and personalities, consumer products and brands, lifestyle and luxury brands and startups.

## JOELE FRANK, WILKINSON BRIMMER KATCHER

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**Joele Frank**, Managing Partner  
**Matthew Sherman**, President

Joele Frank provides effective and disciplined communications counsel and support to help our clients take control in advancing their business and strategic objectives.

Our clients range from large, global public corporations to smaller, private enterprises across many industries. Our professionals have been recognized by our peers, the financial community and journalists for their quality work, strategic acumen and creative approach to challenging issues. The firm's practice areas include investor relations, corporate com-



munications, transaction communications, shareholder activism and corporate governance, crisis communications and special situations, litigation support, restructuring and bankruptcy, and private equity.

Joel Frank consistently ranks among the top PR firms in announced M&A transactions, defense against activist investors, and restructurings.

## KEKST

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**James Fingerroth**, Chairman  
**Jeremy Fielding**, President & CEO

Many companies or institutions will confront unforeseen events that could alter their future, pose unprecedented challenges and potentially set them on a new course that will redefine the organization and significantly impact key stakeholders. What is required in these circumstances is an expert, experienced, strategic communications partner to work with senior management and a Board of Directors to: articulate a new business strategy and a vision for success; explain an enterprise-transforming event and its significance; successfully navigate complex business challenges or crises; build trust and support among key stakeholders; and strengthen the organization's credibility, reputation and brand.

Successful execution requires superior counsel, judgment and expertise, broad experience, and a comprehensive, effective and intelligent approach for communicating to all stakeholders. For over 45 years companies and institutions around the world have selected and relied on Kekst to provide that counsel and support across a wide range of disciplines including: corporate & financial communications; specialized investor relations; mergers & acquisitions, shareholders activism & corporate governance; IPOs & spinoffs; crisis communications; bankruptcy and restructurings; and litigation and regulatory support.

## LANE

A Finn Partners Company

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**Wendy Lane Stevens**, Managing Partner  
**Amber Roberts**, Senior Partner

At LANE, we're not just communications experts. We're multifaceted business experts who deliver smart, inspired solutions that drive growth. Established in 1990, we are proud to be one of the leading financial services PR firms in the U.S., with extensive experience serving clients in retail and commercial banking, investment banking, wealth management and private equity. We've also advised clients in more than 90 M&A transactions, ranging from \$90 million to multi-billion across a variety of industries, including financial and business services, food and beverage, consumer and technology.

In 2016, LANE joined the Finn Partners family, one of the world's fastest growing and largest independent PR firms with over 550 employees globally. We continue to provide clients with the exceptional service and tailored strategies of a boutique firm, and have added the reach, network and integrated capabilities of a global powerhouse operating in 14 major markets.

We are uniquely positioned to meet the challenges financial services companies face in an ever-shifting media, competitive and regulatory landscape. Every client benefits from working directly with senior-level PR, digital and creative strategists who have relevant education and direct experience in the financial industry. We couple our in-depth understanding of the industry with a tenacious approach to connecting with media and influencers. We deliver impactful integrated communications programs that turn clients into thought leaders.

## MWWPR

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MWWPR is one of the world's top independent public relations agencies with a network of eight offices across the U.S. and in the UK. We ensure that our clients Matter More™ by providing strategic counsel and integrated corporate and financial communications programs for both publicly-traded and privately-held companies across a multitude of sectors and geographies.

At MWWPR, we have been a leader in financial communications for more than 30 years. We have unparalleled insights into the investment community, financial markets, industry influencers and the media, knowing what messages resonate with your key audiences. Our seasoned team has developed and implemented comprehensive communications programs for a wide range of companies spanning industries from multinational *Fortune* 100 members to rising start-ups.

From IPO planning/counsel and traditional investor relations/financial communications activities to merger & acquisition and restructuring communications, MWWPR has a proven track record of implementing strategic communications campaigns that support business objectives and are responsive to the unique needs of all internal and external stakeholders.

Our success is predicated on the experience of senior level counselors and proprietary methodologies that combine financial communications/investor relations, reputation management, influencer relations, digital strategies, issues management and employee communications programs to help enhance customer/brand loyalty, build shareholder value and drive success among all key constituencies.

## PADILLA

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**Dave Heinsch**, Vice President/  
Corporate and Investor Relations Lead  
**Matt Sullivan**, Vice President/  
Investor Relations Lead

Padilla is a top 10 independent public relations and communications company comprised of 240 employee-owners. Padilla builds, grows and protects brands worldwide by creating purposeful connections with the people who matter most through public

relations, advertising, digital and social marketing, investor relations and brand strategy. Padilla includes the brand consultancy of Joe Smith, the food and nutrition experts at FoodMinds and the research authorities at SMS.

Clients include 3M, Barnes & Noble College, Bayer, Blue Cross and Blue Shield of Minnesota, Cargill Inc., GE, Hass Avocado Board, Land O'Lakes, Mayo Clinic, Prosciutto di Parma, Rockwell Automation, U.S. Highbush Blueberry Council, the Virginia Lottery and Welch's.

Padilla has provided investor relations and financial communications services to a variety of clients including, Allianz North America, Patterson Companies, Inc., The Mosaic Company, Piper Jaffray and Transamerica.

Padilla is a founding member of The Worldcom Public Relations Group, a partnership of 143 independently owned partner offices in 115 cities on six continents. Make a connection at PadillaCo.com.

## PEPPERCOMM, INC.

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**Deborah Brown**, Partner & Managing Director  
**Jacqueline Kolek**, Partner & Managing Director  
**Maggie O'Neill**, Partner & Managing Director

Peppercomm is an independently owned 21-year-old integrated communications and marketing agency headquartered in New York with offices in San Francisco and London. Helping clients see around the corner and determine what's next sets Peppercomm apart from other integrated communications and marketing firms. It enables us to push boundaries while mitigating risk for clients in financial services, consumer, B-to-B and multi-industry sectors.

Our unique approach and dynamic workplace attract the best talent who, in turn, help us win

— Continued on page 30

## PEPPERCOMM, INC.

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and retain the best clients. While we've won countless awards, we're most proud of being named Best Place to Work in New York City by *Crain's New York Business* and a Best Workplace for Women by Great Place to Work® and *Fortune*.

Our combined years of deep category experience and love of what we do shapes our work. We engage your audiences on every level and set your brand apart. And we do all this to help your bottom-line and build your business. So get in touch. We're all ears.

## RASKY PARTNERS

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**George Cronin**, Managing Director  
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**David Tamasi**, Managing Director

Rasky Partners is a nationally recognized public and government relations firm with nearly three decades of experience providing exceptional client service to financial service and investment companies that operate at the intersection of business, politics and media.

With offices in Boston and Washington, D.C., Rasky Partners offers a comprehensive range of services including media strategy and public relations, government relations, reputation management, crisis communication and digital media to financial clients, including large banks and small, private equity funds and major insurers to help them achieve their business goals and improve their bottom lines.

As an independent firm, Rasky Partners has the flexibility and resources to address complex communications challenges with a commitment to serve our clients' interests first. We are dedicated to providing consistent, strategic hands-on engagement at all levels, as each client team — including the senior professionals — is highly engaged, from the beginning to the end of each client engagement.

View and download profiles of hundreds of PR firms specializing in more than a dozen industries at:  
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**Mike Boccio**, Executive Managing Director

Financial services has long been an important RF|Binder practice area. We have worked with some of the most recognizable brands across retail banking, asset management, brokerage, mutual funds, financial technology, insurance, professional services, and private equity. We are expert in developing fully integrated corporate reputation campaigns, thought leadership platforms, B2B/B2C marketing initiatives, social media programs, digital influencer campaigns, digital planning and execution, corporate social responsibility programs and crisis communications. We also help non-profits and educational institutions influence the public conversation about critical issues in financial services. Importantly, we understand the regulatory and compliance issues that govern communications around financial service companies and products, particularly in the digital arena. Our deep experience enables us to develop and execute measureable programs closely tied to business objectives — whether it's working with influencers to drive online conversation, building a corporate brand reputation or integrating with other marketing programs to drive sales.

## SARD VERBINNEN & CO.

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Sard Verbinnen & Co (SVC) is a leading strategic corporate and financial communications firm recognized for its work in M&A, corporate positioning and profile raising, shareholder activism, restructurings, corporate governance, executive changes, crisis communications, special situations, litigation support, IPOs and cybersecurity.

With more than 150 employees across its seven offices in New

York, Chicago, San Francisco, Los Angeles, London, Houston, and Hong Kong, SVC's highly experienced senior professionals are uniquely positioned to provide high quality, objective advice and execution support to clients across a broad range of industries. SVC professionals draw on deep experience in finance, law, media, corporate governance, investor relations and public affairs.

Founded in 1992, SVC's services and capabilities include media relations, investor relations, market intelligence, perception studies, brand awareness, creative digital content production, video production, social media and online communications, customer and partner communications, employee communications and issue advocacy.

## SITRICK AND COMPANY

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**Tom Becker**, Head of NY Office  
**Mark Veverka**, Head of San Francisco Office  
**Lt. Gen. H. Steven Blum**, (USA Ret.), Managing Director & Practice Lead, Washington, D.C.

Sitrick And Company is widely regarded as one of North America's leading strategic and crisis communications firms. While it has substantial practices in corporate, financial, transactional, reputational and crisis communications, Sitrick is best known for representing clients facing sensitive issues, including reputation management, complex litigation, problems emanating from short-sellers, mergers and acquisitions and restructurings. The *New York Times* called Sitrick "The City's Most Prominent Crisis Management Firm." Sitrick is not a traditional PR firm. *BusinessWeek* said, the "firm is known for going atomic on opponents, using 'truth squads,' 'wheel-of-pain' tactics and high-profile journalists (who write profiles)." The general counsel of a major publicly-traded company wrote simply in an email, "You saved the company, literally." The firm's senior executives include former reporters, editors and correspondents from such media organizations as the *New York Times*, *Wall Street Journal*, *Bloomberg*, *Barron's*, *Forbes*, the *Los Angeles Times*, *San Francisco*

*Chronicle*, CBS Television and NBC Television.

## SLOANE & COMPANY

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Sloane & Company is a specialist public relations firm that focuses principally on corporate and financial media relations, investor relations, crisis communications, transaction support, business to business public relations, and public affairs.

We provide both strategic counsel and tactical support to leading public and private companies, both domestically and around the world. Our clients represent a wide array of industries — healthcare, financial services, technology, telecom, media and travel to name a few. Because we enjoy a broad worldview and are students of our profession, we can share different approaches and best practices across our client base.

We believe in building partnerships with our clients. We work quickly and immerse ourselves fully to understand a client's operations, culture, storylines, opportunities and issues. We then build thoughtful communications programs that deliver the right messages, to the right constituencies, using the right vehicles.

## STANTON

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Stanton provides strategic public relations and brand marketing to clients across a spectrum of industry sectors and sizes — from global firms to mid-size leaders and en-

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## STANTON

Continued from page 30

trepreneurial enterprises. Clients are attracted to — and find a home at — our firm because we deliver a unique blend of smart strategy, strong relationships, innovative thinking and first-class execution that produces business-changing results.

We serve our clients across a variety of communications disciplines including media relations, corporate brand messaging, digital and social media, executive visibility, thought leadership, reputation & crisis management, and internal communications. Our understanding of the business and financial worlds—and the media covering them—allows us to position clients effectively within a broader context.

Our senior professionals spend the majority of their time on client work and aren't afraid to ask tough questions, challenge assumptions, and suggest bold solutions. Flexibility, collaboration, responsiveness, and bureaucracy-free service are the hallmarks of our client relationships.

Clients: 3i, Aberdeen Asset Management, ACL, Albright Capital Management, Assurant Bain Capital, Carl Marks Advisors, Conning Asset Management, CVC Capital Partners, Donnelley Financial Solutions, FFL Partners, FilBen Group, HGGC, Lovell Minnick Partners, Makena Capital, One Equity Partners, Pine Brook, Sun Capital, Tanenbaum Center for Interreligious Understanding, TD Ameritrade, and Vertical Bridge.

## TREVELINO/ KELLER

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Based in one of the strongest financial services and fintech markets in the country, Atlanta-based Trevelino/Keller has built a balanced financial services practice, cutting across fintech and traditional services, including peer to peer lending, credit unions, payment processing, factoring, merchant cash advances, financial security software and data analytics to name a few. With four dedicated markets

— disruptive forces, category pioneers, unknown leaders and wonder women, the agency defines its mission to work with a new generation of visionaries in need of public relations, digital/social marketing, demand generation and creative services.

Having successfully solidified its position as one of the preeminent technology firms in the Southeast, its financial services practice integrates into the firm's existing base of business and consumer experience. Following one of its most successful years, ranked as the 10th fastest growing firm in the US and second fastest in the Southeast, the firm has moved from a service-focused to outcome-driven philosophy, building customized programs around growth, value, leadership and engagement.

Owning the industry's number one retention rate, having lost one staffer to an agency in 14 years, the firm is known for its progressive, culture-rich programs like Red With Ted, CooleafPro, Farm to T/K and Greenworks. For more information, visit trevelinokeller.com.

## VESTED

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Named the world's fastest growing public relations agency, Vested is an integrated communications firm focused on the future of finance. The agency's approach merges deep financial expertise with a creative, inclusive environment to deliver integrated, award-winning campaigns to its clients.

Vested is a founding member of the Global Fintech PR Network and established the public relations industry's first agency-run investment group, Vested Ventures, to make direct investments in finance and financial technology startups.

At Vested, all full-time staffers have the opportunity to earn dividend-yielding shares in the company. Other employment perks that Vested offers include a work-from-anywhere policy, unlimited vacation, company-funded coffee and

ride-share accounts, and a mandatory, three-month sabbatical every four years of employment.

The agency supports a range of firms across the financial spectrum, from established global institutions to disruptive fintech startups. Its client portfolio includes: Asset International, Axioma, Backstop Solutions, Betterment, Bloomberg, Bloomberg Tradebook, Broadridge, Carbon Trade Exchange, CFRA, Citadel, Clarity Money, Codestreet, Contix, D+H, Diebold Nixdorf, DTCC, Elevate, FeeX, Golub Capital, Hyannis Port Research, Institutional Investor Journals, Investopedia, LendIt, Mediant, Misys, Money Lion, M Science, Museum of American Finance, PeerStreet, Polaris, SmartBiz, Remesh, Quantitative Brokers, Synechron, Tabb Group, Tradebird, Virtus Partners, and WorldRemit.

Say hello at info@fullyvested.com.

## WATER & WALL GROUP

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Water & Wall Group is an award-winning integrated communications and marketing agency specializing in public relations, content strategy/development and corporate and crisis communications. Our team has helped countless financial and professional services entities build their brands, articulate investment intelligencia, ironclad their reputations, navigate crises and drive asset flows.

We've worked with some of the best-known brands in the industry, and have helped others grow from emerging businesses into household names. Our financial industry experience includes retail/institutional asset managers, hedge funds, private equity funds, VC firms, ETF providers, wealth managers, fintech companies, investment consultants and more. And our professional services experience extends to law and accounting firms, management and regulatory change consultants, executive compensation specialists and real estate companies.

We're as careful at selecting our clients as they are at selecting us, and if we work together you can be certain you'll have our undivided attention, out-of-the-box thinking

and unwavering commitment to your success.

## WEBER SHANDWICK

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**Liz Cohen**, Executive VP, New York  
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Weber Shandwick's Financial Communications practice has the market-specific expertise, experience and strategic financial communications skills of a specialist firm, along with the resources and international reach of a full-service global agency. This enables us to successfully execute cross-border announcements in any and all regions around the world, including EMEA, Asia Pacific and Latin America. We were ranked as the #8 PR Firm for M&A in 2016 by The Deal as well as the #11 PR firm globally by deal value in 2016 by Mergermarket. Our team is comprised of MBAs, former investment bankers, lawyers, journalists, investor relations professionals as well as savvy media relations experts, all of whom can navigate the most complex financial announcements, as well as shape the media coverage post-announcement. As experts in communications around mergers and acquisitions, spin-offs, bankruptcies and restructurings, initial public offerings, investor relations, special situations and issues management, Weber Shandwick counsels listed and privately-held companies and organizations on a global basis, advising clients on many of the largest and most complex issues and transactions. We work closely with clients and their advisors to ensure consistent, targeted outreach to key stakeholders, including investors, analysts, employees, customers, vendors and journalists to support effective communications around critical financial transactions and issues both locally and globally. Weber Shandwick's financial communications team has an on-the-ground presence in leading financial centers and can draw upon unmatched local market expertise to identify and mobilize advocates. Our established relationships with key financial, business and industry media and investment community influencers are critical in supporting our clients' business objectives. ○



# O'DWYER'S RANKINGS

## TOP FINANCIAL PR & INVESTOR RELATIONS FIRMS

Firm	Net Fees (2016)	Firm	Net Fees (2015)
1. <b>Edelman</b> , New York, NY	<b>\$73,582,000</b>	25. <b>Verasolve</b> , Potomac, MD	<b>\$730,000</b>
2. <b>ICR</b> , New York, NY	<b>38,698,896</b>	26. <b>360PR+</b> , Boston, MA	<b>561,825</b>
3. <b>Prosek Partners</b> , New York, NY	<b>20,350,000</b>	27. <b>Beehive Strategic Communication</b> , St. Paul, MN	<b>556,350</b>
4. <b>APCO Worldwide</b> , Washington, DC	<b>10,443,300</b>	28. <b>North 6th Agency (N6A)</b> , New York, NY	<b>520,504</b>
5. <b>Peppercomm</b> , New York, NY	<b>6,145,095</b>	29. <b>Havas Formula</b> , New York, NY	<b>506,000</b>
6. <b>Dukas Linden Public Relations</b> , New York, NY	<b>5,148,601</b>	30. <b>Greentarget Global LLC</b> , Chicago, IL	<b>505,000</b>
7. <b>RF I Binder Partners</b> , New York, NY	<b>4,306,351</b>	31. <b>Trevelino/Keller</b> , Atlanta, GA	<b>475,000</b>
8. <b>Gregory FCA</b> , Ardmore, PA	<b>4,000,000</b>	32. <b>InkHouse Media + Marketing</b> , Waltham, MA	<b>325,000</b>
9. <b>Bliss Integrated Communication</b> , New York, NY	<b>3,904,000</b>	33. <b>rbb Communications</b> , Miami, FL	<b>316,280</b>
10. <b>Intermarket Communications</b> , New York, NY	<b>3,825,000</b>	34. <b>French I West I Vaughan</b> , Raleigh, NC	<b>302,645</b>
11. <b>Vested</b> , New York, NY	<b>3,580,000</b>	35. <b>Feintuch Communications</b> , New York, NY	<b>247,269</b>
12. <b>BackBay Communications</b> , Boston, MA	<b>2,810,365</b>	36. <b>McNeely Pigott &amp; Fox Public Relations</b> , Nashville, TN	<b>196,537</b>
13. <b>Makovsky</b> , New York, NY	<b>2,628,000</b>	37. <b>IW Group, Inc.</b> , West Hollywood, CA	<b>177,000</b>
14. <b>Lambert, Edwards &amp; Associates</b> , Grand Rapids, MI	<b>2,150,000</b>	38. <b>PAN Communications</b> , Boston, MA	<b>156,058</b>
15. <b>Finn Partners</b> , New York, NY	<b>2,103,000</b>	39. <b>Moore Communications Group</b> , Tallahassee, FL	<b>112,227</b>
16. <b>Padilla</b> , Minneapolis, MN	<b>1,869,560</b>	40. <b>Rosica Communications</b> , Paramus, NJ	<b>72,100</b>
17. <b>G&amp;S Business Communications</b> , New York, NY	<b>1,582,996</b>	41. <b>Landis Communications</b> , San Francisco, CA	<b>70,000</b>
18. <b>Pierpont Communications</b> , Houston, TX	<b>1,401,073</b>	42. <b>Marketing Maven Public Relations</b> , Camarillo, CA	<b>69,099</b>
19. <b>KCD Public Relations</b> , San Diego, CA	<b>1,095,026</b>	43. <b>Lovell Communications</b> , Nashville, TN	<b>44,939</b>
20. <b>Akrete</b> , Evanston, IL	<b>1,066,428</b>	44. <b>Public Communications Inc.</b> , Chicago, IL	<b>22,320</b>
21. <b>CooperKatz &amp; Co.</b> , New York, NY	<b>1,000,805</b>	45. <b>Power Group, The</b> , Dallas, TX	<b>20,000</b>
22. <b>LANE</b> , Portland, OR	<b>969,011</b>	46. <b>Schneider Associates</b> , Boston, MA	<b>12,000</b>
23. <b>Rasky Partners, Inc.</b> , Boston, MA	<b>920,600</b>	47. <b>O'Malley Hansen Communications</b> , Chicago, IL	<b>5,000</b>
24. <b>Jackson Spalding</b> , Atlanta, GA	<b>798,071</b>	48. <b>Standing Partnership</b> , St. Louis, MO	<b>1,985</b>

# A communications plan for cybersecurity breaches

Professional services firms are increasingly becoming the targets of cyberattack. Here's how a tactical and strategic cyber theft-specific crisis communications plan can protect firms' data as well as their brand reputations.

By Josh Merkin

While big retailers continue to be a top target for data thieves, professional services firms are increasingly finding themselves as targets for cyber hackers. This is due to the vast amounts of valuable client data they manage and a reputation for being easier targets because employees at these firms are currently less suspicious and cautious, especially when it comes to phishing scams.

Even though some professional service firms are finally getting the message and investing more in software and consultants to prevent cyber theft, one area where a lot of companies fall short is in developing a cyber theft-specific crisis communications plan.

So far this year, several international and U.S.-based law firms and accounting firms have reported attempted cyberattacks. Recognizing these threats, professional associations within these industries are starting to draft new rules and regulations putting more pressure on firms' leadership to make sure their data is protected. For example, in May, the American Bar Association's Standing Committee on Ethics and Professional Responsibility issued new guidance for lawyers as it relates to their handling of client data. Even though the ABA does not set final rules over attorneys, this is another clear indication to the industry that data security must be considered a priority.

Without a comprehensive and strategic crisis communications plan, firms will be in reactive mode and making key decisions that could negatively affect their brand reputation. While these plans do require a fair amount of work, with the right roadmap, the task doesn't have to be too daunting. One way to go about creating their plan is by borrowing from an old journalism trick and using the 5Ws: who, what, when, where, and why. Here's how these can be implemented:

**Why:** This may seem obvious, but it's still surprising how many firms don't have a crisis communications plan in place, especially for something specific like a data breach. Often this is because they don't want to invest the time or financial resources. Other times, it just gets pushed to the bottom of the list of priorities since it isn't something that has an immediate or direct impact on business profit. However, if you consid-

er that a well-crafted plan can prevent the devastating loss of clients and revenue, it's worth making it a priority.

**Who:** When thinking about the "who," there are three different things to consider. The first is who should be involved in creating the communications plan. A firm's managing partner/director, CEO, etc. may leave that in the hands of a marketing or communications director, but that isn't necessarily the best course of action. Instead, crisis plans should have input from the firm's executive management team, as well as the IT department, legal counsel, administrative leadership, HR executives and any communications agency and software vendors (if applicable). While the plan creation can be led by marketing/PR personnel, it is necessary to get strategic high-level input from senior leadership and department heads to ensure that all scenarios and concerns are covered.

A second "who" to consider is the response team should the firm become a victim of a cyberattack. If data is compromised, even if an attack is thwarted, immediate decisions with potentially significant and lasting impacts will need to be made. Also, the actions and activities outlined in the plan will need to be implemented. Therefore, it's important as part of the planning process to determine who the key decisions-makers are, how will they be assembled when the time comes and who is taking on which specific tasks.

The last "who" is about the audiences or stakeholders the firm will need to communicate with. These will likely include employees, clients, and possibly media, professional associations, law enforcement and even government entities.

**What:** The "what" of a crisis communications plan includes basic key messages and categories of information the firm will need to share with its audiences in the event of a data breach. Even though some information may need to be adjusted in the moment depending upon the specifics of the situation, there is still a lot of boilerplate content that can be assembled in advance. These may include a holding statement for press, internal and external memos, a news release and messaging for the firm's digital channels and website. There will also be questions to address such as whether the

breach was the result of an employee or software error, how much data was compromised and by whom. It's better to consider these scenarios in advance, another reason it is beneficial to have all the key decision makers involved in the development process.

**Where:** A crisis plan's "where" should capture all the channels the firm has available to communicate its messages to its audiences. There are many ways to do this including social media, email, snail mail, e-blasts, phone trees and direct in-person communication. Depending upon the situation, the firm may decide one of the channels is preferred over another or they may decide to use them all, but as part of the planning process, executives should be thinking about the ways that will make most sense depending upon the scenario and actions needed.

**When:** While a cyberattack may leave a lot of uncertainties, the "when" in a crisis plan should identify the point at which the plan will be implemented and the triggers that will activate the response team. For this part, there will likely be a lot of contingencies i.e. when this occurs, then this should happen. This section should be very detailed and specific because, regardless of how good a plan is, if it's not rolled out in the right sequence and everyone involved isn't clear on that process, a situation can be made worse by timing missteps.

We can reasonably expect that professional service firms will continue to be the targets of cyberattack. Therefore, it's incumbent for responsible practitioners to be prepared. While investing in prevention measures like cybersecurity software, professional experts and education is important, it shouldn't be at the price of a detailed tactical and strategic communications plan for a worst-case scenario. The upfront investment of time and resources to create a plan is just plain smart. It offers the potential to protect the firm's reputation and revenue in the long run.

Josh Merkin is Vice President at rbb Communications. ●



Josh Merkin



# A silver lining amid fewer print pubs and reporters

A shrinking media landscape means fewer outlets for PR practitioners to shop their clients' stories, but growing opportunities exist for savvy media relations specialists who know how to make their pitches stand out in a crowd.

By Frank Tortorici

**P**ity the poor PR practitioner. Despite an explosion in social media, the traditional media relations landscape is shrinking dramatically, and with it go the chances of landing substantial ink for their clients' stories.

Every day comes news of another journalism giant axing a major part of its leading daily newspaper. Business/finance sections are shrinking, and many papers are now using wire service reports for national news and sometimes even reviews.

Thinner newspapers and magazines mean fewer opportunities for PR practitioners to feature their clients. In many cases, not only are there fewer reporters per beat — for instance, one or two finance journalists instead of a whole team — but the talented few remaining may be asked to be a Jack or Jill of all trades. For example, it's not unusual for the lifestyle reporter to also be reviewing local restaurants or for the tech specialist to also cover new products.

All of this compression means that media relations specialists need to be savvier and craftier than in the past to land a big story. The news angle you're pitching needs to stand out in a crowd more than ever but also be urgent enough for the targeted reporter to make time for your story amid ever-decreasing chunks of available time and space.

A frequent complaint of journalists is that PR people don't read their stories or their publication at all. It's now crucial to get to know deeply the outlet you're targeting. Yes, you can look up reporters' beats on Cision, but there's no way to truly know the actual possibilities for your client's story short of picking up the paper and studying it or logging on to its site frequently.

You'll see that the finance writer sometimes covers tech stories or that a business writer will often do reviews of a new consumer product. Supplement your reading of the paper with a Google search. That is, once you find out which reporter you are targeting, then comb through his/her past stories to see the breadth of their expertise and coverage.

If the business reporter you think is best for your cybersecurity story has written a good deal in the past about hackings and malware, then you've done your homework and can feel comfortable about speaking with him/her about interviewing your ransomware expert. You probably wouldn't

have known this just by looking at a media database, since fewer reporters mean less specialization; a business reporter these days just may cover every aspect of the business world.

In addition, it's imperative to hone in on why your story should be covered right away. Less space means that many pitches that would have been considered worthy of a story 10 years ago will now be discarded in favor of more urgent ideas. Make sure you convey to the reporter you target that your startup is now currently developing the state-of-the-art solution to a key business need whether it's keeping networks secure or distributing knowledge quickly and efficiently throughout an organization. A reporter is more likely to call you back if you can tell him/her your client has the best solution to a common problem and that it is available now rather than in a few months.

The shrinking media landscape also means that PR executives must consider ever more carefully where to shop their stories. Daily newspapers as thick as the *New York Times* are becoming a thing of the past. It's also true that the number of magazines is heading down, but they still offer more opportunities because they specialize in either a specific industry or locale. Your Boston-based client will have a greater chance of getting ink in a publication that specializes in Massachusetts rather than in the *Boston Globe*, since the amount of space for stories about local businesses has been greatly reduced in daily newspapers. Also, be sure to consider getting your client in industry publications. These magazines might not have the circulation of a large newspaper but they have at their disposal reporters who specialize in tech, pharma, finance or whichever area in which your client excels. These reporters might have worked once at a big newspaper while now they are earning a living at the best periodicals which cover the industry in which they specialize.

A decade ago, a client may have scoffed at a story about their company appearing only online, but these days a significant amount of space for your story in a major online outlet such as The Daily Beast or The Huffington Post is considered a coup. Some of these websites also are bucking the trend and often adding reporters rather than letting them go.

And the fact that every terrestrial media giant has an online counterpart just as influential in effect doubles your chances of coverage. When dealing with a huge media entity such as *Forbes*, it's wise to do your homework and investigate sections relevant to your clients' expertise both in the hard copy magazine as well as on *forbes.com*. This publication is a great example of one that often has separate reporters — some online and some in print — covering the same beat. Often this means you'll be lucky enough to secure a story in at least one of these mediums, and if you really hit the bullseye you might be able to score with your client appearing both in the actual publication as well as on its website.

The important thing is to not look at media these days and get discouraged. Yes, the number of reporters at media organizations of all sizes is decreasing. But every month there's likely a new website popping up in your client's field or an established publication is launching an online section that covers your client's industry.

Also, being a PR executive today means you must have extreme patience. Unless your news is breaking news, it is likely that your client's story will take time to get into print. The fact that many reporters now wear more than one hat means that it's taking them longer to research, write, finish and then get editorial permission to publish.

Today's successful public relations executive knows that it's important to do more thorough media research on the possibilities still out there for coverage and to cast their nets wide to see what "fish" of all types they can pull in. If you're lucky, you have a client knowledgeable enough to appreciate that a solid mixture of online, trade and general publications on your company pack just as much of a punch as an article in a major daily newspaper.

Pity the poor PR practitioner? Maybe not just yet.

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Frank Tortorici

# O'Dwyer's guide to PROFESSIONAL SERVICES

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BackBay Communications is an integrated public relations and content marketing firm focused on the financial services sector, with special expertise in private equity, asset management and fintech.

BackBay is known for helping companies develop strong brands and raise brand awareness through thought leadership, media relations, research and message development and integrated outsourced marketing campaigns. BackBay has very close relationships with major business and trade media. With fifteen employees and offices in Boston and London, BackBay serves companies across the United States, Europe, and elsewhere, leveraging global partners.

BackBay takes a brand-centric, content-driven approach to developing and executing market positioning and integrated communications programs for financial services firms including marketing strategy, content development, creative design and multi-channel distribution of company news and perspectives to build brand awareness, credibility and drive new business for our clients.

Our services include public relations, branding, website development, marketing materials, videos, advertising and social media.

Our industry work and experience includes: Accounting/Advisory, Asset Management, Banks, Financial Technology, Hedge Funds, Insurance, Legal, Private Equity, Venture Capital and Wealth Management.

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Bliss Integrated Communication's roots in professional services run 40 years deep. We count among our clients some of the nation's leading consulting, law and accounting firms, non-profits and associations, as well as innovative technology-enabled B2B solutions providers. Our clients operate across industries including retail, manufacturing, healthcare, technology and more.

Because professional services companies go to market on intangibles (ideas, expertise, education, advocacy, services), we create messages that codify our clients' unique selling propositions to help them stay consistently visible in the media and relentlessly valuable to the markets they serve.

We're energized by complex ideas and translate them into differentiated marketing programs that are achievable, on-strategy and high-impact. We treat our clients' businesses as our own, diving deep to build a seamless understanding of your brand, goals and path to growth. We are channel-agnostic, focused foremost on helping you attract and retain the right audiences at the right time in the sales cycle.

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**Julie Talenfeld**, CEO  
**Don Silver**, COO

When law and accounting firms seek out the very best and brightest Florida PR and marketing experts, they count on Boardroom Communications (DBA BoardroomPR).

We are a full-service public relations and integrated marketing

agency delivering results for many of Florida's top law and accounting firms. By utilizing a systematic approach to bridge new and traditional media, our clients have an edge in rising above Florida's highly competitive professional services market.

For more than 25 years, clients have turned to BoardroomPR for creative solutions to increase visibility, establish credibility and ultimately make their phones ring. Our highly experienced team of former journalists, multimedia and web marketing specialists and senior marketers have more than 100 years of combined experience counseling attorneys, accountants and their firms. Services include media relations, press conferences, media training and crisis management, social media, website marketing, video production and new business development training.

Whether you are a specialized boutique, a statewide firm or a Florida office of an out-of-state firm, we can help bring you to the next level. BoardroomPR has the experience and know-how to get the job done.

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**Bob Gold**, President

Bob Gold & Associates is a results-driven, boutique-sized agency headquartered in Southern California with a satellite office in New York City and a global PR network of partner firms. We provide clients with strategies that resonate and engage, propelling businesses forward with an immediate, positive impact on the bottom line.

Whether you are a start-up or Fortune 500 firm in the entertainment technology industry, a content creator or simply looking to build your business, we will enhance your brand story and secure more buzz for your budget.

Our goal is to educate media and analysts about your organization, share your expertise, and demonstrate the effectiveness of your solutions.

Yes, press releases are part of the mix but our expertise lies in content creation, leveraging advertising, negotiating better rates and standing out at trade shows.

Together, we align audiences with news hooks that resonate and result in earned stories, while helping you build powerful relationships to increase exposure through sponsorships and press tours.

Since 1997 we have focused on relationship-building, bringing instant credibility to our clients' business and providing unparalleled services to tell their story and generate results that we are all proud of.

## COOPERKATZ & COMPANY, INC.

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**Ralph Katz**, Principal  
**Anne Green**, President / CEO

CooperKatz has extensive experience supporting professional services organizations, including management consulting firms, industry analysts, research organizations and trade associations. The agency offers a unique integration of marketing, public affairs, digital / social and creative services capabilities to support clients in: developing thought leadership programs; executing research; providing high-level media training; connecting experts with timely issues; driving content marketing strategies; securing op-eds, bylines and speaking opportunities; conceiving and leading digital / social media strategies; and developing presentations, meetings, events, videos, trade advertising and collateral materials. Our professional services experience has included engagements for such clients as: American Institute of Certified Public Accountants (AICPA); 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); Navigant; Nielsen Media Research; Noblis Health Innovation; PwC; Siegel+Gale; TowerGroup and TowersPerrin.





**Henry Feintuch, president, Feintuch Communications**

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**Henry Feintuch, President**  
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**Managing Director**

Looking for senior hands-on support and demonstrated ROI for your professional services organization... but not big agency overhead?

Feintuch Communications is an award-winning b-to-b firm with extensive experience in working with professional services firms and associations from legal, accounting, real estate and technology to market research, branding, digital media, media buying and more.

We collaborate with our clients to help package the core essence of their offerings and what makes them a standout in their field. Then, we develop a smart marketing and strategy to help build their brand, burnish their thought leadership and generate leads/revenue. Tactics typically include strategic media relations (business, financial, trade), speaking platforms, special events, social media, association marketing and awards/honors programs.

Our firm is a founding member of PR World Alliance, an international alliance of premier independent communications consultancies. Clients can leverage our network to implement projects throughout Europe, Asia, Africa and South America. Our principal is CFO of PRWA and a past president of PRSA-NY.

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**Bob Hope, President & Co-Founder**  
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Bob Hope and Paul Beckham are two of the most well-known names in public relations and have been since well before the inception of Hope-Beckham Inc. in 1994. Their vast backgrounds helped pave the way for a firm known for staying up-to-date on the latest trends in public relations. They're often asked to advise clients how to navigate choppy waters, and their deliverables keep those clients coming back for more of their innovative ideas.

Both are active in the community and sit on numerous boards including Atlanta Convention & Visitors Bureau (Bob) and Emory Center for Ethics (Paul). They consider their clients "friends" and their "friends" are some of the most recognizable names in Atlanta. As members of Rotary Club of Atlanta, they never miss an opportunity to network with established businesses and start-ups alike.

According to this dynamic duo, "Connectivity and know-how result in award-winning big ideas!"

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ICR brings a wealth of experience working with tax, accounting and compliance firms, management consultants, law firms, executive search firms, HR consulting firms, associations and other critical services organizations. Our innovative campaigns have earned the most prestigious communications and digital awards. As a top five independent corporate communications agency, ICR can assemble the ideal integrated team needed to achieve business objectives. Our current client base and knowledge spans 20 sectors.

Our integrated communications campaigns help differentiate brands and build thought leadership in fiercely competitive industries. The results include more new business opportunities, stronger reputations, and new talent. Starting with a proprietary immersion process, we create customized communications programs involving positioning, messaging, top-tier media relations, executive visibility, content, social media, marketing, digital communications, measurement and more. Contact Scott Tangney, Managing Director, scott.tangney@icrinc.com, 646-277-1299

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**Hope-Beckham President & Co-Founder: Bob Hope (left) and Chairman & Co-Founder Paul Beckham (right).**



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InkHouse is breaking the agency mold. We're making traditional media relationships relevant again. And we're breaking down creative silos with integrated PR, content, social media, design, filmmaking and paid editorial all in one place. We value progress over process, but we also believe in the power of measurement. We're bi-coastal, 10 years old, 100 people, and one of the fastest growing agencies in the country.

Founded in 2007, InkHouse's steady growth can be attributed to the company's longstanding reputation for solid PR and content campaigns, and deep bench of experienced communications professionals, former journalists and creative thinkers on staff.

We partner with global brands, Fortune 100 enterprises, venture capital firms and technology companies at any stage of their lifecycle. Our client roster runs the gamut from enterprise technology (fintech, security, cloud, wearables,

Continued on page 38



**Marketing Maven booked client Paul Amelio founder of N2 Global Solutions on Cheddar TV to discuss the SuperSocket.**

## INKHOUSE

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SaaS), to professional services, venture capital, healthcare, education, consumer and real estate.

With offices in Boston, Providence, San Francisco and New York, InkHouse is well-positioned to serve both national and international clients looking for dynamic, thoughtful integrated communications campaigns.

## MARKETING MAVEN

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Bicoastal integrated marketing and strategic communications firm, Marketing Maven, focuses on media relations, investor relations, issues management, crisis communications and public affairs. We are in constant communication with key financial media, analysts, shareholders and influencers on behalf of our clients. From traditional earned media to new forms of social engagement, Marketing Maven drives conversations while maintaining a positive reputation for clients by delivering newsworthy messages to key audiences, using a range of platforms.

From high profile litigation, bankruptcy or restructuring announcements, analyst calls with media, public affairs issues with utilities companies, law enforcement association communications,

mergers and acquisition stakeholder communications to reputation management for educational institutions, our strategic execution is core to the success of our campaigns for financial and professional services clients.

Marketing Maven is 8(a) certified by the U.S. Small Business Administration, Women's Business Enterprise (WBE), has WOSB status with the government and DBE, CUCP and CPUC certification.

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**Michael Layne**, President

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

For more than twenty-five 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, referral sources, prospects and other stakeholders.

At Marx Layne & Company, we understand the subtle nuances and legal issues when marketing pro-

fessional services. We are able to take our clients' complex messages and package them in concise formats that are compelling to print, broadcast, online and social 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 highly credible means beyond paid advertising. Our professional services agency clients retain us to position them as experts, to generate feature profiles in leading business media, to ghost-write 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, our clients are positioned 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, and writing and printing of brochures and newsletters.

And Marx Layne does all of this while continuing to respect the correlation between dollars spent by our professional service firm, clients and results.

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**Kassy Perry**, President/CEO  
**Julia Spiess Lewis**, Senior Vice President  
**Jennifer Zins**, Vice President

Perry Communications Group is an award-winning, full service strategic communications firm. Led by Kassy Perry, PCG shapes ideas, galvanizes opinions and influences decisions ultimately leading to social change. The PCG team helps clients positively impact public policy issues not only in Sacramento, but throughout California and the U.S. PCG

tackles high-profile issues such as health care, energy and environment, finance and water.

Whether the politically savvy PCG team is managing a complicated issue, running a statewide initiative campaign, leading a high-profile coalition or helping clients communicate, shape and influence with a mix of traditional and digital strategies, we achieve success by building strong relationships with policymakers, the media and corporate influencers. We excel at working with local and state governments. Since the company's founding, we have worked with *Fortune* 500 companies, major industry associations and charitable organizations.

PCG provides services for an array of clients including: Pharmaceutical Research & Manufacturers of America, Bonnie J. Addario Lung Cancer Foundation, Partnership to Fight Chronic Disease, California Association of Health Underwriters, California Chronic Care Coalition, California Area Agencies on Aging.

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**Justine Griffin**, Managing Director  
**David Tamasi**, Managing Director

Rasky Partners is a nationally recognized public and government relations firm with nearly three decades of experience providing exceptional client service to professional service organizations that operate at the intersection of business, politics and media.

With offices in Boston and Washington, D.C., Rasky Partners offers a comprehensive range of services including media strategy and public relations, government relations, reputation management, crisis communication and digital media to professional services clients in the healthcare, education, energy, legal, real estate, financial and technology industries.

As an independent firm, Rasky Partners has the flexibility and resources to address complex communications challenges with a commitment to serve our clients' interests first. We are dedicated

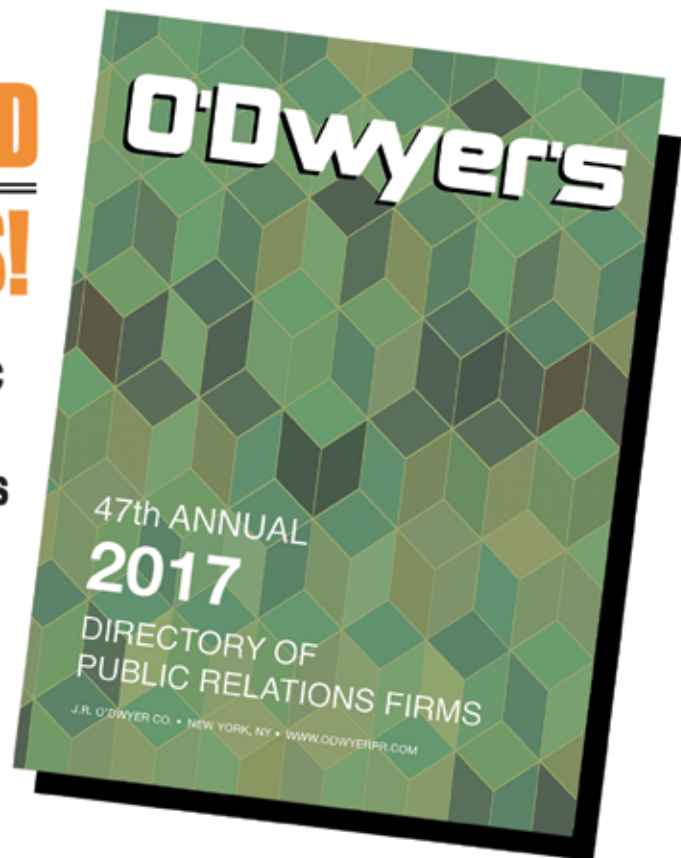
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O'Dwyer's is the #1 source for researching public relations firms and outside PR counsel. We've been connecting clients and PR firms for 45 years through our directory of PR firms.

You get quick access to large, medium-sized, and small PR firms and even experienced freelancers who work out of their homes. Whether you seek a long-term, worldwide relationship or need extra help on a project, **O'Dwyer's Directory is the place to shop.**



## Why O'Dwyer's Directory of PR Firms is so popular:

- ✓ Has brought billions of dollars in business to PR firms.
- ✓ Authoritative industry rankings, based on CPA statements, tax returns.
- ✓ Firms ranked by 14 geographical regions in the U.S.
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*"O'Dwyer's Directory of PR firms is the finest source of information on PR firms."*

- Howard Rubenstein, President  
Rubenstein Associates

*"Up-to-date, indispensable resource. Saves time and money. Every PR pro should have one."*

- Robert L. Dilenschneider  
The Dilenschneider Group

*"A phenomenal job-seeking aid."*

- Marie Raperto  
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*"Single most important source of information on PR firms."*

- Thomas L. Harris, Author  
*Choosing and Working with your PR firm*



**Olympian and New Jersey native Laurie Hernandez was the master of ceremonies at this year's The Boys and Girls Clubs in New Jersey annual Youth of the Year Gala. Laurie is pictured here with Susan Haspel, State Director of The Boys and Girls Clubs in New Jersey and Chris Rosica, President of Rosica Communications.**

## RASKY PARTNERS

Continued from page 38

to providing consistent, strategic hands-on engagement at all levels, as each client team – including the senior professionals – is highly engaged, from the beginning to the end of each client engagement.

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**Chris Rosica, President**

Rosica Communications is an integrated PR and online marketing firm that promotes and protects companies, brands and people. Founded in 1980, the firm serves a diverse clientele in the B2B and professional services, pet products, consumer packaged goods, food and beverage, healthcare and nonprofit sectors. Our PR, social media and communications capabilities for professional services companies include positioning and messaging, thought leadership, media relations, social media management, crisis

communications, content marketing, corporate communications, cause marketing, tradeshow support, direct marketing, media training and influencer relations. Rosica's social media services include strategy, management, branding, content development/optimization and follower acquisition. Our online marketing team, based in New Windsor, NY, specializes in SEO, online reputation/reviews management, online advertising (PPC and social ads) and website development.

As a "thinking partner" focused on achieving client objectives, Rosica creates and executes thought leadership programs with clearly defined KPIs and metrics. We craft compelling, authentic stories and effectively disseminate our clients' good news to support their sales efforts. Our process includes:

- Strategically identifying our clients' business and marketing goals

- Defining target audiences, influencers and key opinion leaders
- Honing the positioning, story and key messages; tailoring messages by each audience
- Developing measurable, integrated and creative PR, social media and internal/external communications programs
- Proactively communicating with clients
- Aggressively securing measurable results; benchmarking against pre-determined objectives
- Repurposing and leveraging content and PR coverage to augment tradeshow marketing, SEO, online reputation management, direct marketing and other activities

## SCHNEIDER ASSOCIATES

Member of the Worldcom Public Relations Group

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**Joan Schneider, Chief Executive Officer & Founder**  
**Phil Pennellatore, President**

Successfully communicating key messages to diverse audiences in the ever-changing digital age is one of the biggest challenges facing today's corporate leaders.

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accelerate awareness and engagement, and help our clients achieve measurable growth. Through integrated marketing strategies, we create multiple brand touch points with customer and stakeholder audiences while generating significant awareness in converged media channels, including marquis placements in publications such as the *Wall Street Journal*, the *New York Times*, The Huffington Post, and ABC Nightline.

Schneider Associates is a full-service public relations and integrated marketing communications agency specializing in Launch Public Relations®, a proprietary method of launching new and revitalizing iconic products, services, companies, institutions and communities to build awareness, excitement and sales. Visit [www.schneiderpr.com](http://www.schneiderpr.com).

## TUNHEIM

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**Brian Ortale, Chief Financial Officer**  
**Liz Sheets, Chief Marketing Officer**  
**Darin Broton, Stan Alleyne, Senior Consultants**

For 27 years, Tunheim has successfully helped clients navigate complex change with thoughtful and creative communications counsel. Our mission is to be the premier communications consulting company in the region by offering our clients the best pool of talent and unparalleled service. We operate by the fundamental beliefs that well-informed people make good decisions and effective communication is a critical component of successful business strategy.

Rethinking is our methodology. It means looking inside everything, to think outside everything. Particularly, we help our clients rethink how they must be understood by their stakeholders. We take on client goals as our own and tailor our approach for each unique client and situation. Clients benefit from our application of research, market analysis and experience. We bring insight. We develop strategy. We commit to flawless delivery.

We are a certified woman-owned business and a member of IPREX, the second largest independent global agency network. ○



**Tunheim's executive team. Front row (L-R): Pat Milan, Chief Insights Officer; Liz Sheets, Chief Marketing Officer. Back row (L-R): Kathy Tunheim, CEO + Principal; Brian Ortale, Chief Financial Officer; Lindsay Schroeder Treichel, Chief Transformation Officer.**

O'Dwyer's September issue will profile Beauty & Fashion PR firms. If you would like to be profiled, contact Associate Editor Steve Barnes at 646/843-2089 or [steve@odwyerpr.com](mailto:steve@odwyerpr.com)



# O'DWYER'S RANKINGS

## TOP PROFESSIONAL SERVICES PR FIRMS

Firm	Net Fees (2015)	Firm	Net Fees (2015)
1. <b>Edelman</b> , New York, NY	\$96,865,000	27. <b>PAN Communications</b> , Boston, MA	780,291
2. <b>Finn Partners</b> , New York, NY	11,005,000	28. <b>Havas Formula</b> , New York, NY	701,000
3. <b>Prosek Partners</b> , New York, NY	7,170,000	29. <b>Pierpont Communications</b> , Houston, TX	691,309
4. <b>Jackson Spalding</b> , Atlanta, GA	6,540,342	30. <b>Greenough</b> , Boston, MA	540,142
5. <b>Greentarget Global LLC</b> , Chicago, IL	6,536,000	31. <b>Beehive Strategic Communication</b> , St. Paul, MN	408,844
6. <b>Bliss Integrated Communication</b> , New York, NY	4,514,400	32. <b>Power Group, The</b> , Dallas, TX	401,681
7. <b>Rasky Partners, Inc.</b> , Boston, MA	4,032,202	33. <b>Standing Partnership</b> , St. Louis, MO	348,596
8. <b>5W Public Relations</b> , New York, NY	3,700,000	34. <b>L.C. Williams &amp; Associates</b> , Chicago, IL	346,563
9. <b>Quinn</b> , New York, NY	3,433,547	35. <b>The Buzz Agency</b> , Delray Beach, FL	333,596
10. <b>Moore Communications Group</b> , Tallahassee, FL	3,081,170	36. <b>Public Communications Inc.</b> , Chicago, IL	302,264
11. <b>Peppercomm</b> , New York, NY	2,698,922	37. <b>SPM Communications</b> , Dallas, TX	234,044
12. <b>rbb Communications</b> , Miami, FL	2,695,935	38. <b>Marketing Maven Public Relations</b> , Camarillo, CA	222,286
13. <b>Ripp Media/Public Relations</b> , New York, NY	2,574,401	39. <b>Rosica Communications</b> , Paramus, NJ	179,833
14. <b>Padilla</b> , Minneapolis, MN	2,196,520	40. <b>Maccabee</b> , Minneapolis, MN	176,480
15. <b>CooperKatz &amp; Co.</b> , New York, NY	2,110,934	41. <b>IW Group, Inc.</b> , West Hollywood, CA	144,000
16. <b>Sachs Media Group</b> , Tallahassee, FL	1,999,448	42. <b>TransMedia Group</b> , Boca Raton, FL	140,000
17. <b>French   West   Vaughan</b> , Raleigh, NC	1,966,007	43. <b>WordWrite Communications LLC</b> , Pittsburgh, PA	104,000
18. <b>Schneider Associates</b> , Boston, MA	1,805,329	44. <b>Landis Communications</b> , San Francisco, CA	100,000
19. <b>Makovsky</b> , New York, NY	1,314,000	45. <b>Trevelino/Keller</b> , Atlanta, GA	100,000
20. <b>Konnect Agency</b> , Los Angeles, CA	1,262,302	46. <b>Akrete</b> , Evanston, IL	70,360
21. <b>Gregory FCA</b> , Ardmore, PA	1,100,000	47. <b>Lovell Communications</b> , Nashville, TN	54,087
22. <b>North 6th Agency (N6A)</b> , New York, NY	1,020,081	48. <b>Intrepid Agency</b> , Salt Lake City, UT	51,750
23. <b>Fish Consulting</b> , Hollywood, FL	981,000	49. <b>Feintuch Communications</b> , New York, NY	45,210
24. <b>McNeely Pigott &amp; Fox Public Relations</b> , Nashville, TN	855,811	50. <b>O'Malley Hansen Communications</b> , Chicago, IL	28,000
25. <b>Verasolve</b> , Potomac, MD	821,000	51. <b>Bob Gold &amp; Associates</b> , Redondo Beach, CA	10,133
26. <b>Inkhouse Media + Marketing</b> , Waltham, MA	805,610	52. <b>Red Sky PR</b> , Boise, ID	2,013

# The failure of Donald Trump's PR

By Fraser Seitel

What took him so long? After months of working as White House Press Secretary for a boss who offers zero guidance, zero trust and maximal public abuse, Sean Spicer finally resigned.



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

Good for him.

Every day, Spicer went to work knowing that his function was unappreciated, his counsel ignored and his contribution to any public understanding of the Administration's actions, virtually impossible.

Here are the five reasons why any press secretary, no matter how competent – be it Anthony Scaramucci,

Sarah Huckabee Sanders, Laura Ingraham or Mother Theresa – is doomed to fail with Donald Trump as their boss.

## No understanding of/respect for PR

Most CEOs haven't the slightest idea what public relations is all about, but since they pay for it, they accept the function, work to understand it and, in some cases, grow enormously to respect it.

Not so Donald Trump.

He doesn't understand that public relations is all about building positive relationships, by communicating clearly and honestly, actions in the public interest. Positive public relations is built on truth and transparency.

In Trump's view, public relations is there to do his bidding, to communicate what he wants when he wants it, regardless of appropriateness or veracity. Public relations, Trump feels, requires no particular skill or experience. That's why he appointed a hedge fund manager to run his communications office.

Trump considers himself a master of public relations (He's not.). And he considers his public relations spokesmen as necessary evils.

An impossible workplace for a professional public relations person.

## Public relations instincts are all wrong

At his White House media introduction, Communications Director Scaramucci credited his new boss for having the best public relations instincts.

Sorry, Mooch.

Left to his own instincts, Trump is a walking public relations disaster; the original "Ready Fire Aim."

Trump's recent *New York Times* interview with three rabid Timesmen eager to roast him, is the latest example of bad instincts getting worse. The Times' interview, in which Trump, inexplicably, berated his own Attorney General and once most ardent supporter Jeff Sessions, was apparently concocted by the President himself. Accompanying him to the crucifixion was Hope Hicks, a longtime Trump public relations defender not especially known for pushing back.

The interview had no strategic purpose, no talking point game plan, no reason to be conducted. In other words, pure Trump.

Real estate mogul Trump's wrongheaded public relations instincts could be hidden by selective media exposure. Candidate Trump, the anti-Washington outlier, could also get away with misguided public relations decisions.

But President Trump, in the spotlight 24/7, has no place to hide.

## No advice wanted

A professional public relations person aspires to become a counselor, advising his employer as to the most optimal communications strategy and messaging to realize organizational goals.

A smart employer will consider public relations counsel equally with legal counsel; arriving at a decision that is balanced between what is legal and what is right. A savvy boss will include his public relations person in all high-level discussions.

In the White House, Spicer groused about being limited in his access to the President. The former Press Secretary learned early and often, Trump doesn't want public relations advice. He knows what to do, and you don't. So shut up and do what he says.

Check please.

## Second guessing/public shaming

One reason Sean Spicer chose to cut back on the daily televised White House Press Conference was that his boss would famously sit in front of a TV in a nearby office and rate his Press Secretary's performance.

Usually, Spicer failed; whereupon Trump would let it be known publicly how displeased he was.

A good boss, of course, first informs his trusted subordinates about what's going on, discusses with them how issues should be handled and then gives them latitude in handling difficult questions from the media. If occasionally, said subordinates mess up, a competent executive will bring them

aside, in private, point out deficiencies and suggestions to improve.

Trump, on the other hand, who can hardly be classified a "competent executive," seems to delight in public shaming, especially of those who work for him.

## The emperor has no clothes

And that, in the final analysis, is the real reason that any public relations professional is probably doomed working for Donald Trump. (Are you listening, Sarah Sanders?)

Donald Trump is the original man born on third base who thought he hit a triple. His father owned miles of debt-free real estate in Brooklyn and Queens, which ultimately bailed out his overreaching son when he verged on bankruptcy. Critics accuse Trump of being a blatant self-promoter, who lacks humility and tends to, ahem, stretch the truth.

And, of course, they're right.

So, for any professional public relations person to accept a position with this White House, they must first get a promise, in advance, that their advice will be listened to, their position will be respected, and they will never be bad-mouthed publicly.

That requires a public relations person who is self-assured, confident in his or her expertise and independently wise, not to mention wealthy; in other words, an individual willing to walk away the moment the Commander-in-Chief violates the promise.

Sean Spicer clearly wasn't that individual. But I bet he feels a lot better today than he did last week. ○

## PR news brief

### Squire Patton Boggs powers Westinghouse

Squire Patton Boggs is working for bankrupt Westinghouse Electric as parent company Toshiba shops for a buyer for the maker of nuclear power plants.

Westinghouse filed for Chapter XI in March due to financial pressure from massive cost overruns on two plants under construction in South Carolina and Georgia, a drop in natural gas prices, the rise of alternative solar/wind power sources and safety concerns that intensified after the 2011 Japanese earthquake that rocked the Fukushima reactor.

SPB counsels Westinghouse on matters related to bankruptcy matters as well as issues concerning the Committee on Foreign Investment in the US, which blocks foreign entities from acquiring an American company due to national security concerns.

The Trump Administration could use CFIUS to block a bid for Westinghouse by Chinese investors.

China is in the midst of a nuclear power plant building spree with 20 reactors currently under construction.

Former Senators John Breaux (D-LA) and Trent Lott (R-MS) are members of SPB's Westinghouse team.

Toshiba bought Westinghouse for \$5.4 billion a decade ago.



# Obtaining higher profitability in the PR industry

By Richard Goldstein

I've authored many a column on PR firm profitability and what it takes to be a profitable agency. The benchmark in the industry has been 20 percent. I've always felt that 20 percent profitability leads to mediocrity.



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

Based on Gould Partners' PR agency report for 2016, profitability of the surveyed firms is 15.2 percent. Agencies under \$3.0 million in revenue netted 14.3 percent, while firms up to \$10 million netted 14.6 percent. Agencies up to \$25 million netted 17.4 percent and those more than \$25 million netted 18 percent.

So much for the industry benchmark of 20 percent! The Canadian firms that participated in the Gould survey averaged an operating profit of 23.4 percent.

In my view, the industry goal needs to be 33 percent. For many agencies 20 percent is a push, let alone 33 percent. Nevertheless, the bar needs to be set at 33 percent. There's a definite path that needs to be followed to obtain 33 percent. In the past, I've outlined the road to profitability. This month I will again give my views on this subject.

## The building block to profitability

The most basic principle of profitability is to know what it will cost your agency to service a client. PR principals ask this question for many purposes, including formulating overall strategies, service emphasis, and meeting reporting obligations.

The PR agency needs to understand the basic principles of job costing. When we think of job costing, a manufacturing company may come to mind. While this is often correct, the PR agency needs to know the cost of providing services to each client before the service is rendered, not after. Job costing is a system where costs are assigned to a distinct unit, batch, or product or service. The product or service is often custom made, such as providing unique services to a customer.

PR agencies provide customers with services or intangible products. Within the PR sector, jobs often differ considerably in terms of their length, complexity, and resources used. It's critical for agencies to know their job cost for profitability analysis

and pricing. Accurate cost information is especially important for PR agencies because competition can be fierce among agencies.

Here's a homework assignment for you: look up Activity Based Costing for service industry firms and determine if this method of understanding the cost of providing services to customers should be considered by your agency.

## Guaranteeing low profitability

Based upon the Gould reports, many agencies are experts in this area. So, what can cause low profitability in addition to not understanding the cost of providing services to your clients?

Low profitability is a direct result of not managing your engagements properly or knowing how to price the engagement. Either of these can result in always operating in crisis mode.

Fear of losing a client is next. Fear leads, in my view, to over servicing. If it's not fear, please let me know why you over-service at your agency. I'm happy to publish your comments, a top ten list if you will.

Thinks about the last time you hired a contractor to work on your home. You arrived at a price and the contractor started work. An unforeseen event arose that required the contractor to make a change or do the job differently or you wanted a modification to the work to be completed. Did the contractor over service you? Or, did you learn two key words: "Change Order?"

## The test of profitability

In my experience, smaller agencies (less than \$2.0 million) generally have lower profitability for the reasons mentioned above. When I meet an agency that seems to have profitability issues, I review three basic factors (similar to a medical professional performing a basic examination).

The first test is the revenue per professional test. I generally multiply the total full time employees (or its equivalent) by \$200,000. I would expect to see a \$2.0 million agency with ten professionals as having \$200,000 for this benchmark. According to the Gould survey, revenue per professional was \$211,995 for 2016. This is a key indicator of productivity of professional staff.

The second test is to divide revenue by billable hours (note: this is not part of the Gould survey). Smaller agencies are hard pressed to tell me how many billable hours are generated. I usually use 1,500 hours per professional or some other amount that agency management feels is appropriate. I would like to see an average billing rate of at least \$185 per hour. In this case, the revenue

for the agency should approximate \$2.775 million not \$2.0 million. Accordingly, the agency has failed to earn \$775,000 of additional revenue. The real problem is when the test result comes up with \$85 hour. This is not as uncommon as you would think among smaller agencies.

Labor cost is next on the list. According to the Gould survey, total labor cost is 58.9 percent, up from 58.5 percent. According to the survey this is too high and an indication that salaries, bonuses and freelance labor have not been managed tightly. Model firms keep it as low as 50 percent. Frankly, I find it difficult for firms operating in key markets (New York City, Los Angeles, Chicago) to meet the 50 percent mark. In fact, in my experience, agencies with poor cash flow and profitability benchmark at 70 percent to 80 percent.

Therefore, if labor is 70 percent and operating overhead is approximately 26 percent, total cost is 96 percent. You can do the math. ○

## PR news brief

### Account exec, data scientist, CMO named top ad jobs

The world of advertising is brimming with new opportunities across a growing number of diverse skill sets, with account executive, data scientist, market research analyst and chief marketing officer now comprising some of the hottest positions in the industry this year, according to a new report on the best jobs in advertising by job search site CareerCast.

With a reported annual median salary of \$127,560 and a growth outlook of nine percent, advertising account executive was ranked by CareerCast as one of the top jobs to land in advertising in 2017.

Chief marketing officer, with a median salary of \$99,310 and projected growth of seven percent, was cited as another top position to have in the industry.

Data scientists, who perform quantitative research on consumer trends and interpret numbers to help agencies and corporate creative departments shape their strategies, was cited this year, perhaps surprisingly, as a coveted position in the industry, with an annual median salary of \$111,260 and a current growth outlook of 16 percent.

Web developers, which have a growth outlook of 27 percent and an annual median salary of \$66,130; market research analysts, with a growth outlook of 19 percent and an annual median salary of \$62,560; and social media managers, with a growth outlook of six percent and an annual median salary of \$58,020, were also listed as other promising fields in the industry this year.

In fact, social media manager was ranked number 42 this year by CareerCast out of the top 200 best jobs to have in the U.S., due to the job's quality work environment and high projected growth rate, even when taking into account the relatively high levels of stress that come with the position.

CareerCast's analysis comes as part of the job search site's annual "2017 Jobs Rated Report," which scores professions by compiling U.S. Bureau of Labor Statistics numbers on growth outlook and pay.

## Raytheon's Esper takes Army post

**P**resident Trump has recruited Mark Esper, who heads Raytheon's Washington lobbying operation, for the Army Secretary post.

The West Point graduate and Gulf War vet leads Raytheon's 20-member Arlington office and runs its political action committee.

The maker of Tomahawk cruise missiles, which is among the top five defense contractors, chalked up more than \$28 billion in revenues from its 65,000-plus employees.

Esper joined Raytheon in 2010 from the US Chamber of Commerce, where he led its Global International Property Center and Europe/Eurasia divisions.

Earlier, he was Executive VP-Defense & International at Aerospace Industries Assn., Director of National Security Affairs for former Senate Majority Leader Bill Frist and Deputy Assistant Secretary of Defense. ○



Mark Esper

## Levine is first Berlin/Rosen COO

**D**avid Levine, a top aide to President Obama and Hillary Clinton, has moved to BerlinRosen, the Democratic public affairs shop, as its first COO to oversee its finance, HR and operations functions.

Valerie Berlin, co-Founder of the Manhattan shop, noted that Levine's management savvy would help guide BR as it grows to more than 110 staffers.

"He will drive high-functioning operations, talent and recruitment to support our work as we continue to scale," she said.

Levine served as Chief of Staff in the Obama White House responsible for 234 people and National Operations Director at Obama for America, which ranks as the largest presidential campaign.

He was deputy COO for Clinton's presidential bid and in charge of its wind-down strategy.

Prior to joining the Obama team, Levine was National Operations Director for the Democratic National Committee and Deputy COO for M+R Strategic Services.

Founded in 2005, BR has worked for Samsung, Ford Foundation, Brooklyn Public Library, Communications Workers of America and New Hampshire Senator Maggie Hassan. ○



David Levine

## Naple joins STG

**M**ike Naples, an Obama Administration alum, has joined STG, the public affairs shop founded by Democratic operatives Julianna Smoot and Paul Tewes.

The former Dept. of Health and Human Services Communications Director for Human Services also worked on the staff of Congressman Jerry McNerney and as Press Secretary for the Brady Campaign & Center to Prevent Gun Violence.

Smoot, a prolific fund-raiser, was National Finance Director for the 2008 Obama campaign. As deputy campaign manager for the 2012 run, Smoot and her team raised more than \$1 billion.

Tewes directed Obama's key win in the Iowa caucus and headed



Mike Naples



national party operations during the general election. Earlier, he was National Coordinated Campaign Director of the Democratic Senatorial Campaign Committee and then its political chief. ○

## Uber puts Ballard in Driver's seat

**U**ber has retained Ballard Partners of Florida, which has close ties to the Trump White House, for its Washington lobbying team.

Brian Ballard, top fundraiser for the President who chaired Trump Victory organization in Florida, opened a D.C. outpost earlier this year. He also helmed the Sunshine State's presidential campaigns for John McCain and Mitt Romney.

Uber faces key issues in D.C. including privacy, data security and regulations regarding driverless vehicles.

Ballard heads a lobbying team that includes Dan McFaul, one-time legislative director to Florida Congressman and now "Morning Joe" co-host Joe Scarborough, Sylvester Lukis, veteran of the Dept. of Health and Human Services, and Rebecca Benn, ex-aide to Mississippi Senator Thad Cochran.

Tallahassee-based Ballard has offices in West Palm Beach, Miami, Orlando and Jacksonville.

Uber spent \$1.4 million in Washington lobbying during the past year. ○

## Amazon appoints lobbying support amid sales tax salvo

**A**mazon.com has retained government relations firm McGuireWoods Consulting for Capitol Hill support on tax-related issues.

The e-commerce giant has retained MWC for help with the Marketplace Fairness Act of 2017, which would restore state governments' ability to collect sales taxes from retailers with no physical presence in their state. The Internet's largest retailer has also hired MWC to lobby in response to the Remote Transaction Parity Act, which gives states the authority to enforce state and local sales and to use tax laws on remote transactions.

Finally, McGuireWoods will also advocate on behalf of the Seattle-based retailer in regard to the testing and operation of unmanned aerial vehicles in the U.S.

A seven-person team manages the Amazon account, including Senior Advisor Michael Drobac, who previously led government affairs for Netflix and was also director of government affairs for IAC/InterActive Corp. as well as VP-government affairs at the Online Publishers Association.

Drobac was formerly Congressional aide to Senators Gordon Smith (R-Ore.) and Kay Bailey Hutchinson (R-Tex.) as well as a Legislative Director for Sen. Norm Coleman (R-Minn.).

MWC staffs more than 1,000 lawyers in 23 offices worldwide. ○



## Qatar hands \$1M pact to IMS

**Q**atar, which is locked into a diplomatic tussle with its Arab neighbors, has hired Information Management Services to a \$1.3 million, three-month engagement.

Hired by Qatar's information office, IMS is to provide research, communications and strategic support to the Gulf State.

The firm's will focus on areas such as situational awareness, open source analytics, strategic counsel and direct support and engagement.

The contact is renewable in quarterly increments of \$375,000 per-month.

Saudi Arabia, Bahrain, United Arab Emirates and Egypt have maintained an air, land and sea blockade of Qatar for the past month.

Their foreign ministers on July 5 vowed to continue the pressure until Qatar cuts ties with Islamist groups and shuttered its free-wheeling Al Jazeera satellite TV network, which has been a thorn in the side of the Gulf States.

The sanctions, according to Reuters, have triggered a wave of nationalism in Qatar and support for its 37-year-old ruler Sheikh Tamim.

Qatar, which is rich with natural gas, is the world's wealthiest nation on a per-capita basis. **○**

## China gives PR ticket to ride to BLJ

**T**he People's Republic of China filed a \$24,000 per-month contract with BLJ Worldwide effective June 28 for ongoing PR services.

Peter Brown's firm is to support programming and activities of Beijing's DC embassy with services such as drafting/editing statements, media monitoring, social media, spokesperson training, crisis management and special events.

President Trump, according to the *New York Times*, is frustrated by

Chinese leader Xi Jinping's failure to lean on North Korea over its missile launches.

He warned China's president that the US is willing to act alone if China fails to "put a heavy move on North Korea."

The Times reported the honeymoon between the two presidents is over following Washington's decision to sell weapons to Taiwan, threaten trade sanctions and brand China as a human trafficker.

Brown is the former manager of The Beatles and director of Apple Corps. **○**

## Sorini Samet targets US officials for Haiti

**S**orini Samet & Assocs, which had been promoting investment in Haiti through the Association of Industries of Haiti, is now targeting US government officials and Congress in an effort bankrolled by the Haitian government.

The Haitian Central Bank and Haiti Center for the Facilitation of Investments is funding the campaign aimed at Trump Administration officials and members of Congress.

The Association asked SS&A to arrange meetings for Haiti's Ministry of Commerce and Industries to discuss matters such as extension of the Caribbean Basin Trade Partnership and HOPE/HELP legislation.

Established in 2000 by President Clinton, the CBTP created 40,000 jobs in Haiti, serving as a major boost to its troubled economy.

President Trump, who ran an election campaign geared to returning manufacturing jobs to the US, is not viewed as a strong proponent of the CBTP. **○**

### 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. For a complete list of filings, visit [www.fara.gov](http://www.fara.gov).

**BLJ Worldwide LTD**, Washington, D.C., **registered June 29, 2017 for Embassy of the People's Republic of China in the U.S.**, Washington, D.C., to provide public relations services in support of the Embassy's programming and activities.

**Fratelli Group**, Washington, D.C., **registered June 30, 2017 for Delegation of the European Union to the U.S.**, Washington, D.C., regarding a one-day workshop for business leaders and other key stakeholders focusing on policy advocacy.

**diGenova & Townsing, LLP**, Fairfax, VA, **registered July 24, 2017 for Kurdistan Democratic Party Seventh Branch (USA & Canada)**, Fairfax, VA, regarding counsel on the September 2017 Referendum on Independence and DOD funding.

### 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).

**Chambers, Conlon & Hartwell, LLC**, Washington, D.C., **registered July 25, 2017 for Uber Technologies, Inc.**, San Francisco, CA, regarding discussion of app-based technological advancements, deployment of self-driving vehicles for commercial purposes, and issues relating to FAA reauthorization and DoD guidance on TNC access to military installations.

**The Outlaw Group**, Alexandria, VA, **registered July 25, 2017 for American Massage Therapy Association**, Evanston, IL, regarding regulatory proposals that may impact massage therapy.

**Kamins Consulting**, Annandale, VA, **registered July 27, 2017 for Victims of Terrorism – East Africa**, Chicago, IL, regarding compensation for U.S. Government employees killed or injured in bombings of U.S. Embassies in Africa in 1998.

**Cassidy & Associates, Inc.**, Washington, D.C., **registered July 27, 2017 for American Wind Energy Association**, Washington, D.C., regarding wind energy siting issues.

**McDermott Will & Emery LLP**, Washington, D.C., **registered July 26, 2017 for Lumina Analytics**, Tampa, FL, regarding efforts to increase awareness and use of big data and machine learning to identify and prevent terrorist activity.

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## Public Relations Firms Database



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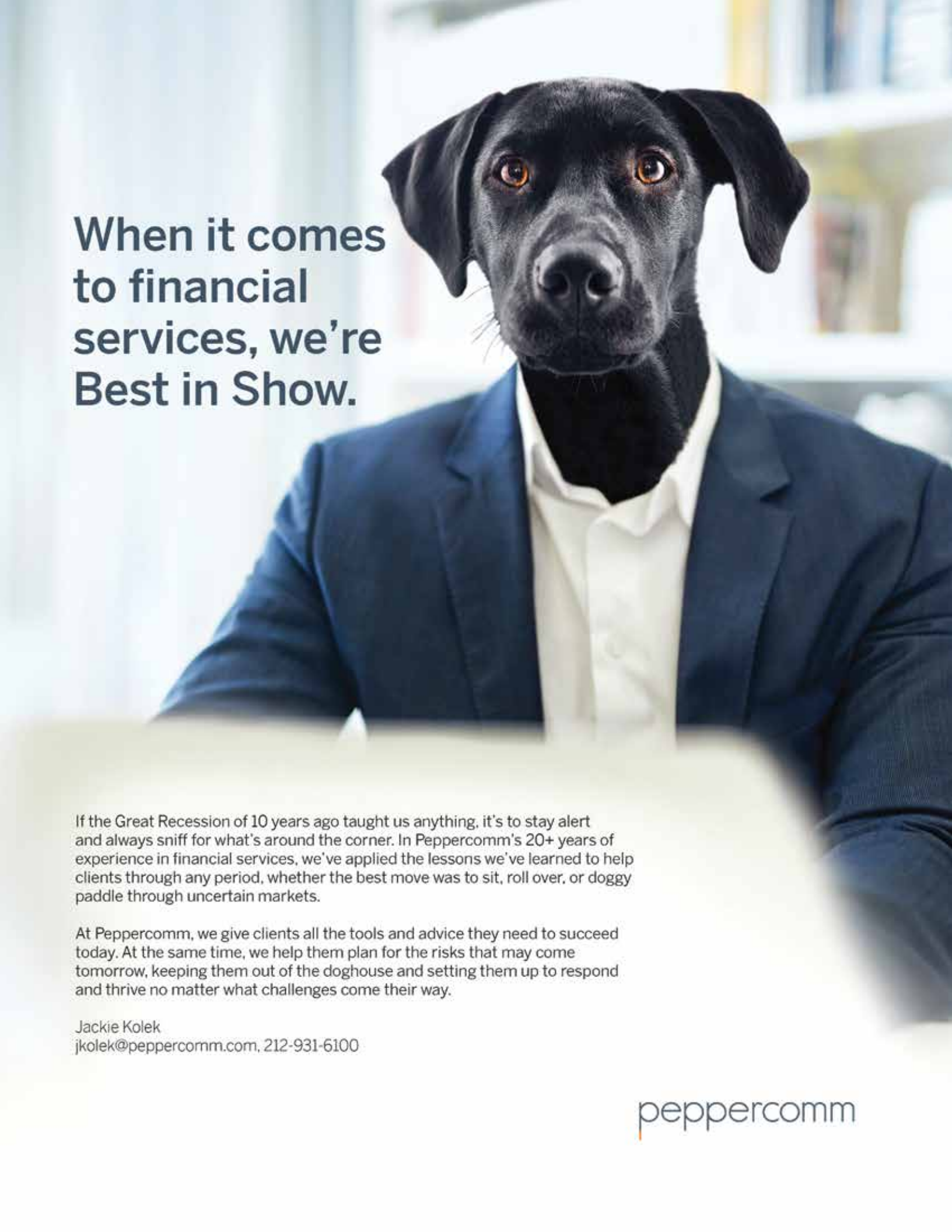
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