



## Setting the Foundations for a Successful PA Strategy

14<sup>th</sup> February 2023, Brussels

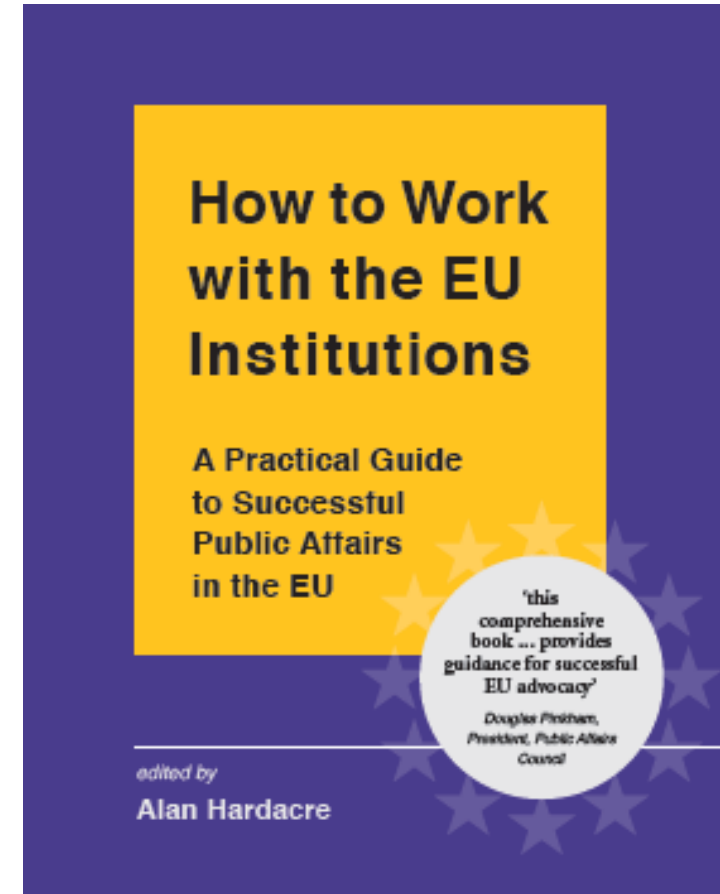
Dr Alan Hardacre



# Dr Alan Hardacre



- Co-founder [www.AdvocacyStrategy.com](http://www.AdvocacyStrategy.com)
- Consulting for Kindred, CropLife & others
- ex-Director of Corporate Affairs @ Imperial Brands
- 20 years Public Affairs experience
- Author of several articles & books
- Long time Member of Board of Public Affairs Council
- Visiting Professor in UK, Thailand, Switzerland, Belgium, Netherlands...



# Public Affairs Council Skills Trainings 2023

February 14<sup>th</sup> ❤️

## Setting the Foundations for a Successful PA Strategy

Topics: Broad approach, setting objectives and prioritizing

April 27<sup>th</sup>

## Quantifying Public Affairs Risks and Opportunities

Topics: How to build a clear overview of risks and opportunities

September 28<sup>th</sup>

## Mapping and Engaging with Stakeholders Strategically

Topics: Stakeholder mapping & engagement

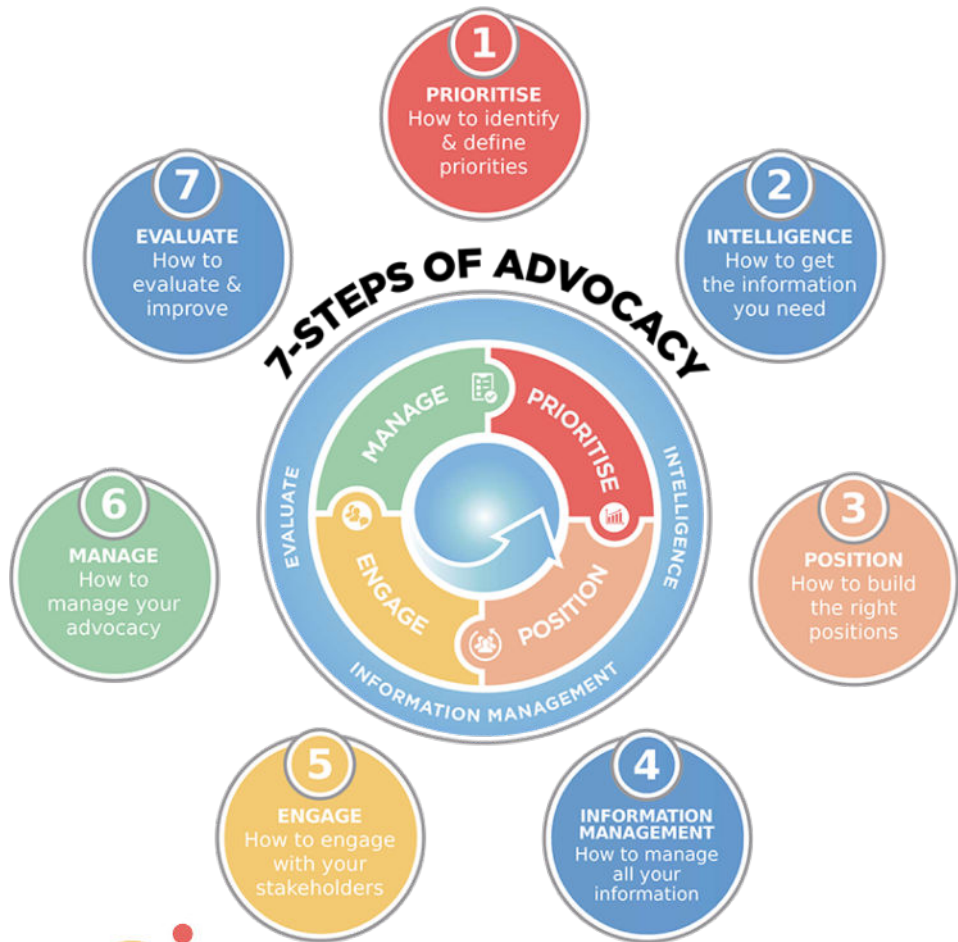
November 16<sup>th</sup>

## Evaluating and Communicating Your Public Affairs Work

Topics: Measuring (and communicating internally) impact, evaluation and ROI



# AdvocacyStrategy Model: A Winning Advocacy Process



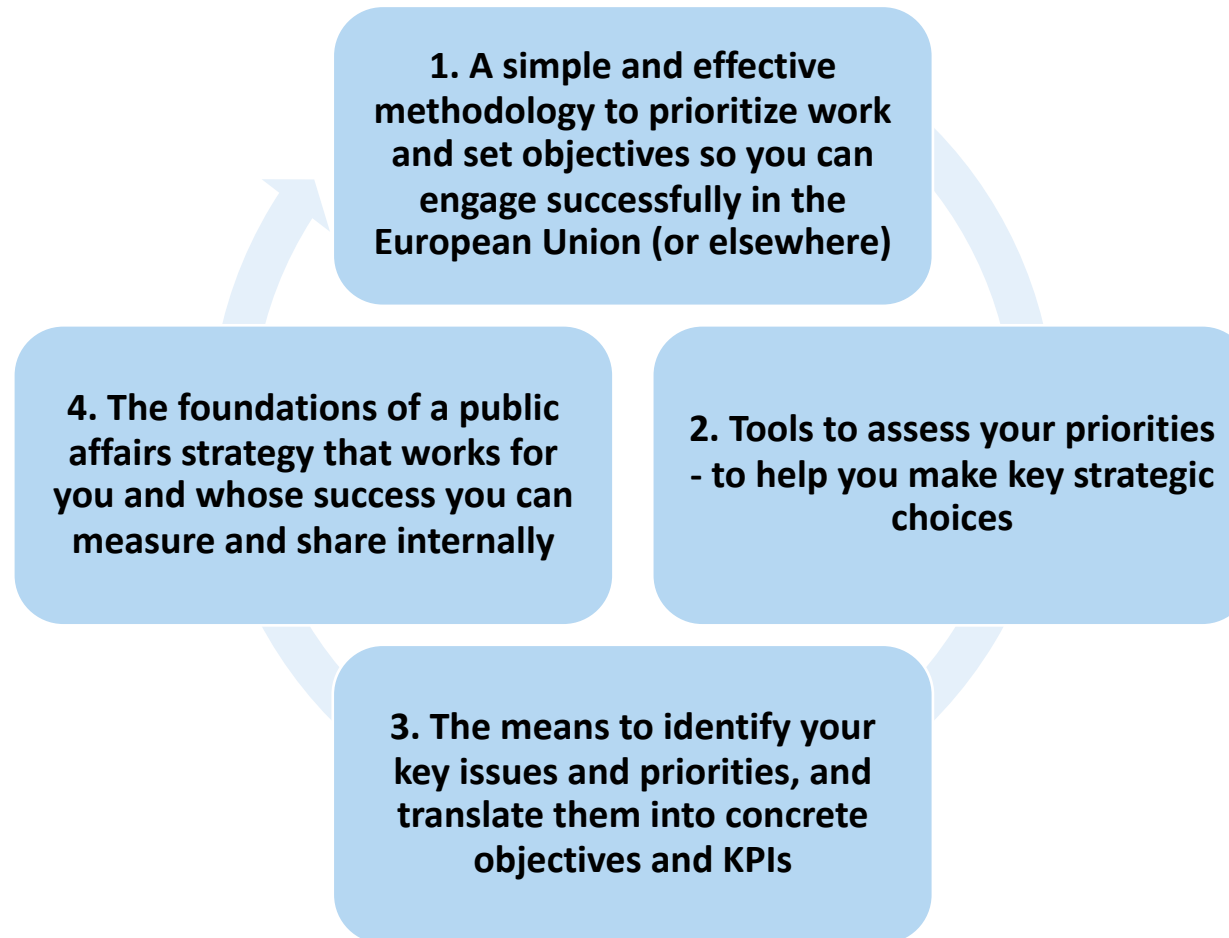
N°	STEP	FOCUS
1	Prioritize	How to identify & define priorities
2	Intelligence	How to get the information you need
3	Position	How to build the right positions
4	Information Management	How to manage all your information
5	Engage	How to engage with your stakeholders
6	Manage	How to manage your advocacy
7	Evaluate	How to evaluate & improve



# Tour de Table

What are your expectations for the programme and today?

# Foundations for a Successful Public Affairs Strategy



# Advocacy is Inter-dependent

- Link between prioritise and other steps is key
- Changes in one step require changes to many-all steps
- Everything in here is interlinked



# What we are going to do...

## 1. Setting Priorities

When defining your advocacy priorities, do you:

- Use a robust process and/or tool to identify, analyse and order your priorities?
- Have a visual to present strategic considerations?
- Have +/-2-4 top priorities from a list of at least 10 potential issues?
- Create a timeline of the political / policy-making process for each of the priorities?

## 2. Defining Objectives

When you translate your advocacy priorities into the objectives, do you:

- Use a model such as SMART, 4DX and/or OKR?
- Define a list of key performance indicators?
- Focus your objectives on the campaign's final outcomes and/or also on the advocacy activities?

## 3. Managing Priorities & Objectives

When you manage your priorities and objectives, do you:

- Review them weekly, monthly, quarterly or annually?
- Discuss and confirm them with your client / management team?
- Incorporate 'horizon scanning' in order to explore future developments, emerging issues and focus on 'things to come?'



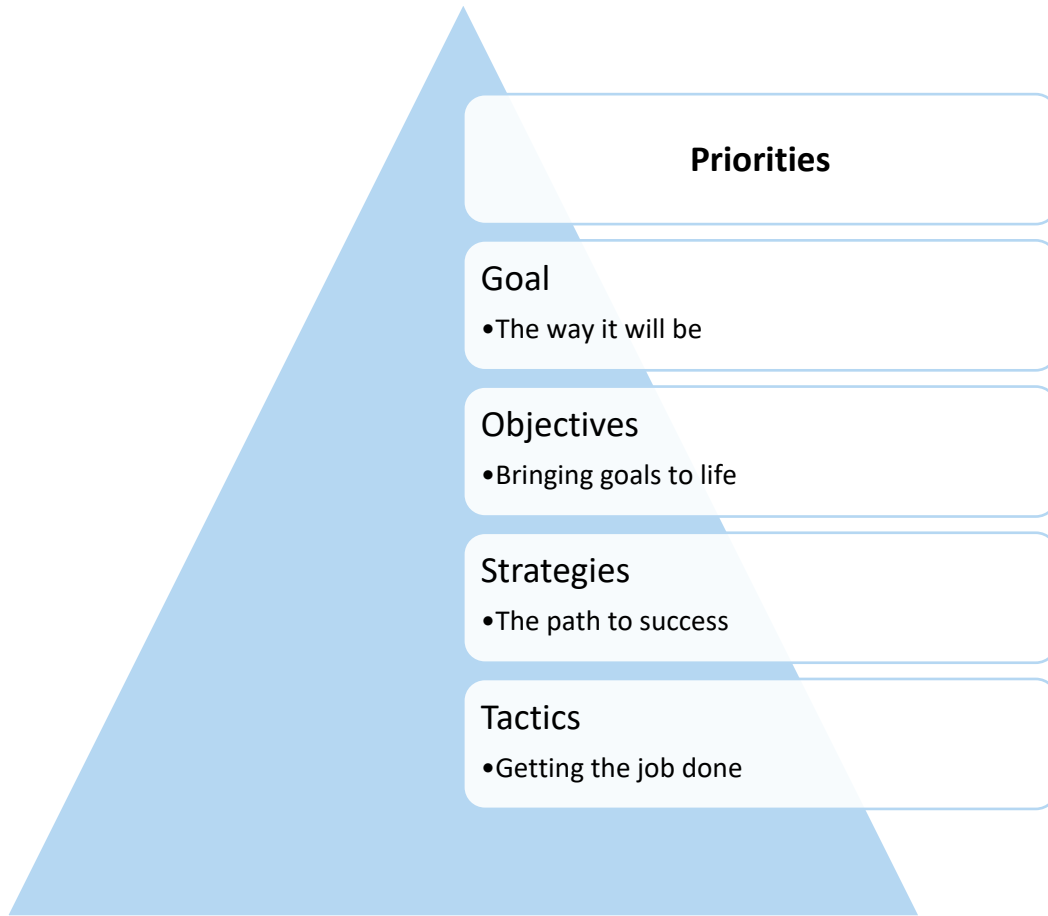
# PRIORITIZATION

## Setting Priorities



Choices – Opportunity – Cost – ROI – Link to performance

# Why Prioritization is SO Important?



- Priority setting is a planning process
- Important aspect of self-management
- Sets positive (and realistic) expectations
- Puts meaning and focus into work
- Defines how you will channel all your resources/energy to accomplish your priorities
- Helps link you to your organisation
- Can help with visibility

How do you currently determine your advocacy priorities?

What issues do you face?

Can you name your top 3 or 5 priorities?

# Quantified Priorities and Must Win Battles

Develop a light (but effective) process to gather business feedback on all policy risks-opportunities that you face/see

Create a dashboard to show the key identified policy risks, the quantified financial risk associated with each, the anticipated timeframe

Support key discussion groups around the quantified Must-Win Battles to develop one clear set of priorities and expectations

Advise on the selection and ranking of commercial / Public Affairs priorities

Support in keeping the dashboard updated, track progress and build out reports on key priority choices and public affairs ROI



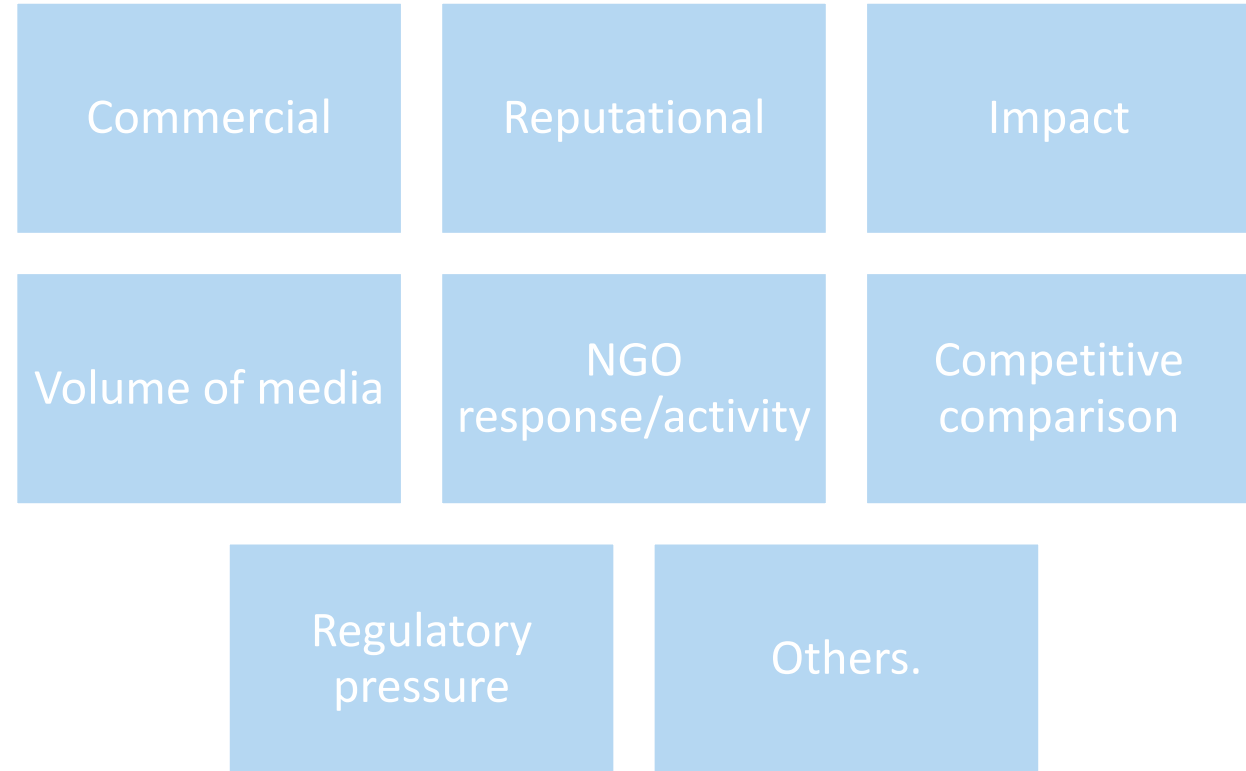
# How to Prioritize

- Prioritise your issues
  - Is this a core or peripheral issue?
  - How consistent is this issue with your goals?
- How many resources should we commit to this issue?
  - Limited resources: Is this 'the' issue
  - Is this worth engaging on?
- Is this issue Technical or Political?

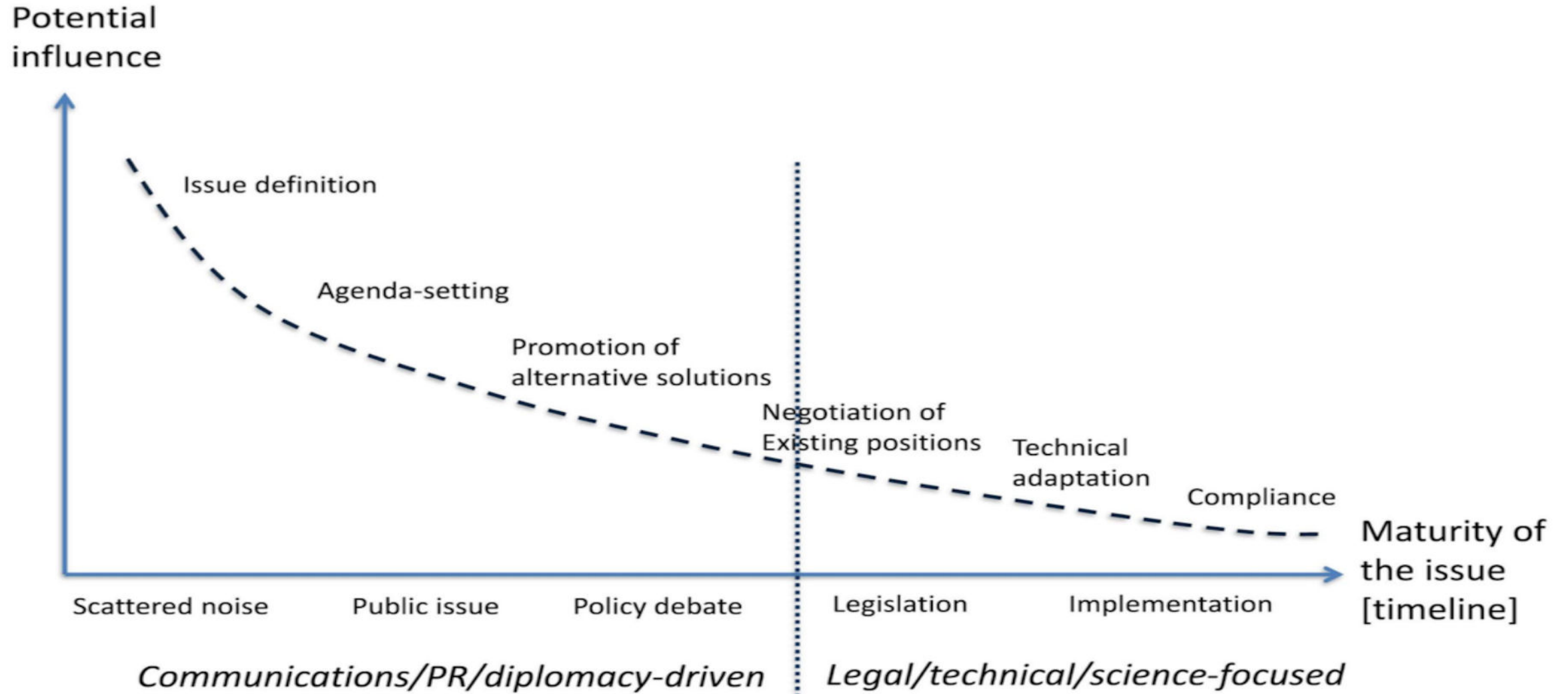
	A	B	C	D	E
5	Medium	High	Very High	Very High	Very High
4	Medium	Medium	High	Very High	Very High
3	Low	Medium	Medium	High	Very High
2	Low	Low	Medium	Medium	High
1	Low	Low	Low	Medium	Medium

# What to Prioritize

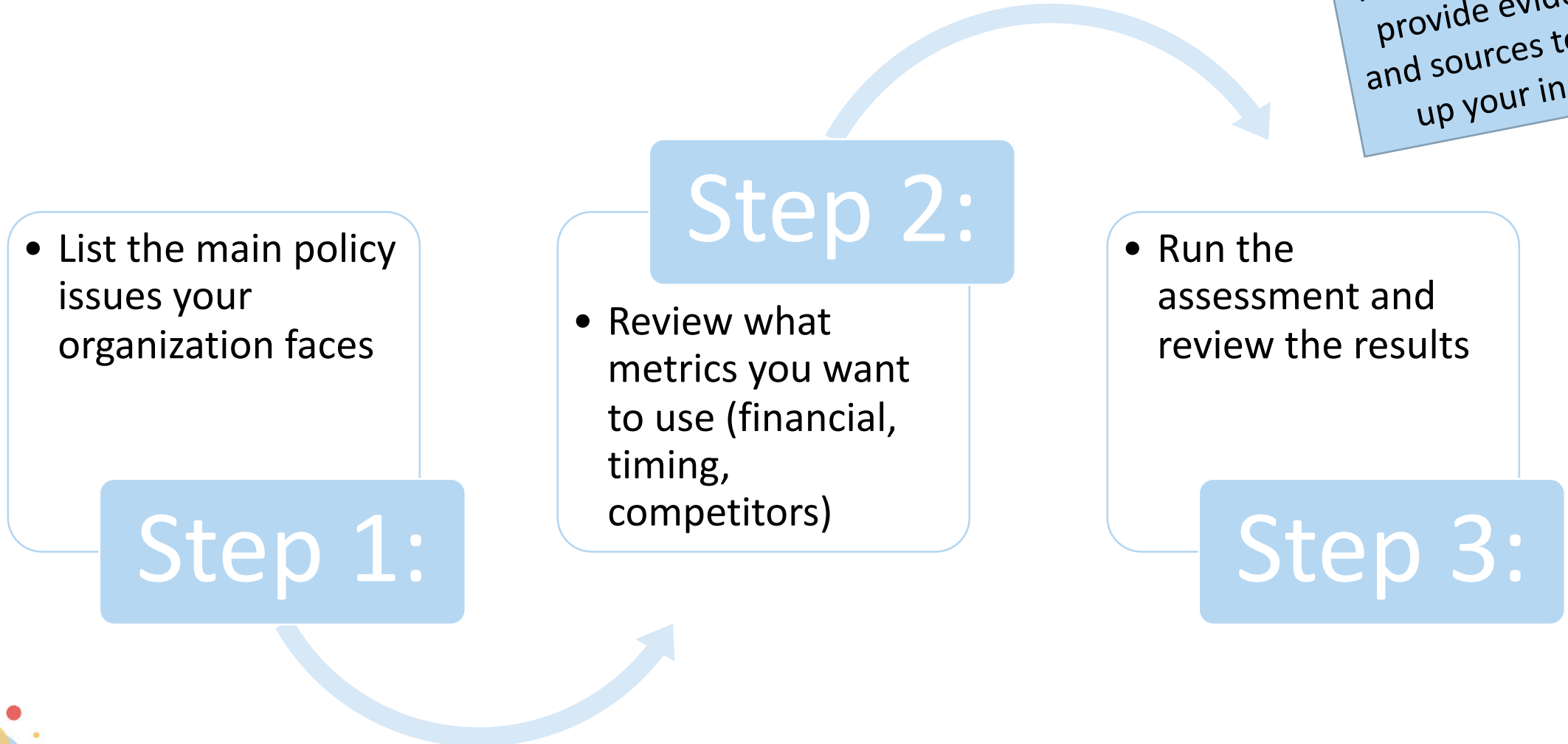
Understand what parameters for prioritization work for you / your business



# Prioritize in Time



# What to Prioritize







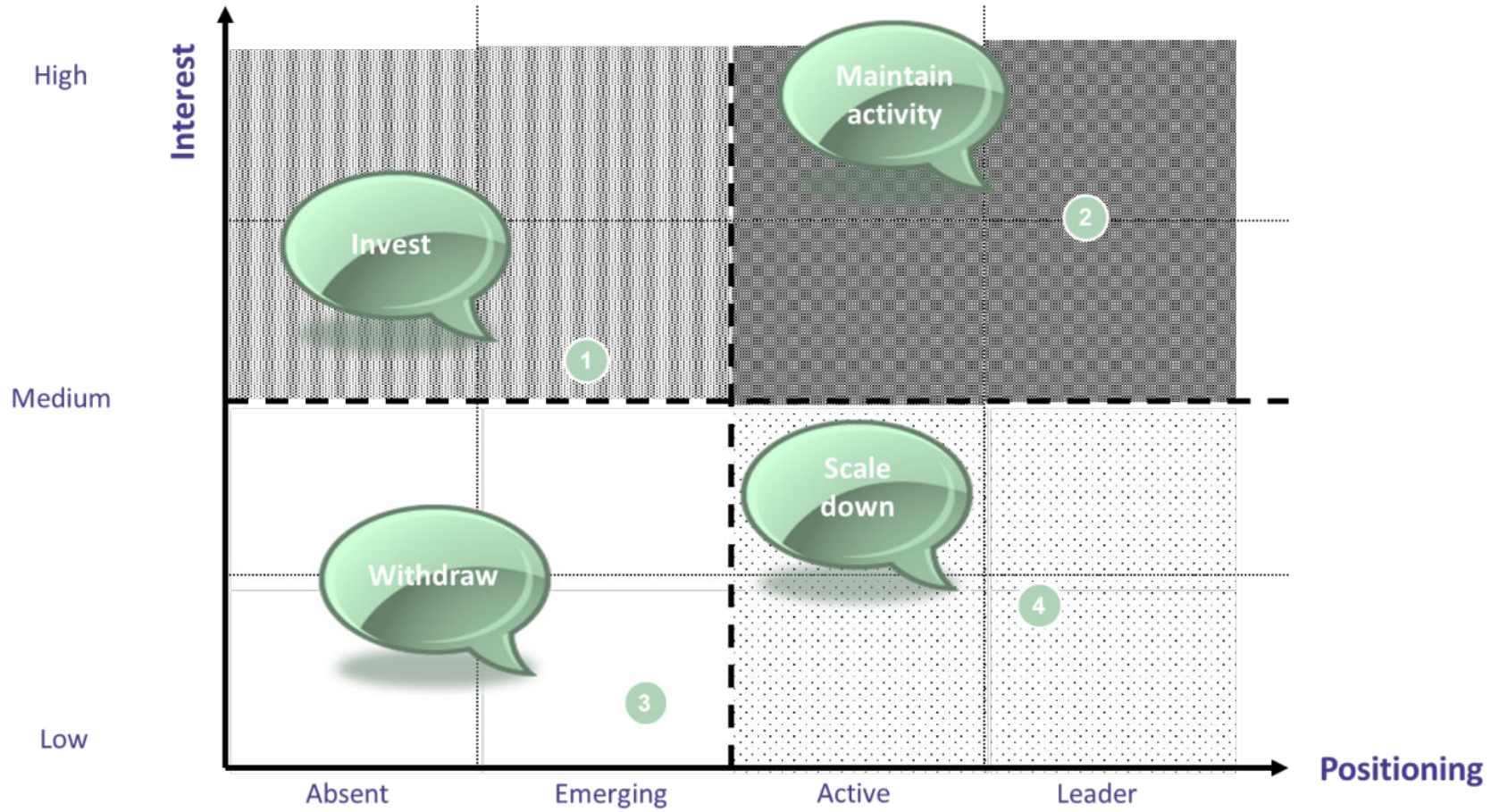
Have  
a  
Break



# Setting Priorities

European issues		Interests of your organisation																				Positioning in the EU today							
		Image				Commercial				Financial				Professional				Legal / Other				Absent	Emerging	Active	Leader				
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4				
1	Subject #1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2	Subject #2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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n	Subject #n	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
		1 Low importance				2 Medium importance				3 High importance				4 Essential															

# Visualizing Priorities



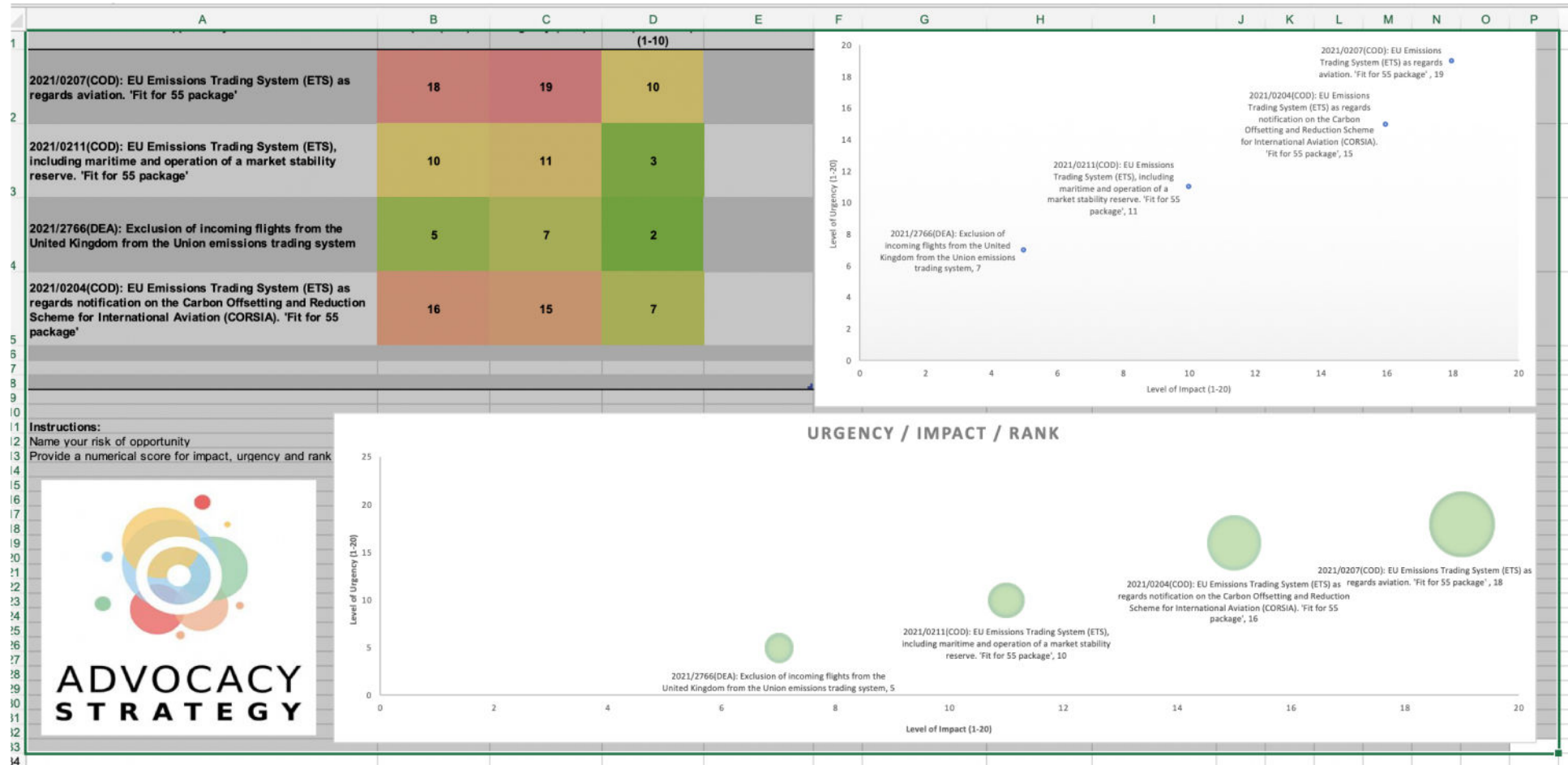
# General Mills Issues Prioritization System

General Mills Issues Prioritization System			
Issue			
“Pubic Sensitivity”		“Strength of company position”	
<b>Volume/tone of media/social</b> <small>Fusce posuere, magna sed pulvinar ultricies, purus lectus males</small>	5 ↑	<b>Position established/communicated</b> <small>Fusce posuere, magna sed pulvinar ultricies, purus lectus males</small>	4 ↑
<b>NGO/Investor</b> <small>Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus.</small>	5 ↑	<b>Weight of science</b> <small>Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus.</small>	3 ↔
<b>Consumer</b> <small>Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac /customer turpis egestas. Proin pharetra nonummy pede. Mauris et orci.</small>	5 ↑	<b>Strength of solution options</b> <small>Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac /customer turpis egestas. Proin pharetra nonummy pede. Mauris et orci.</small>	4 ↑
<b>Regulatory Pressure</b> <small>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. uada libero, sit amet commodo magna eros quis urna.</small>	5 ↑	<b>Mission alignment</b> <small>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. uada libero, sit amet commodo magna eros quis urna.</small>	4 ↑
<b>Competitive comparison</b> <small>Proin pharetra nonummy pede. Mauris et orci.</small>	4 ↑	<b>Potential \$ impact</b> <small>Proin pharetra nonummy pede. Mauris et orci.</small>	4 ↑
<b>Total/5</b>	<b>4.8</b>	<b>Total/5</b>	<b>3.8</b>

*Source:* Naamua Sullivan, General Mills, 2013



# Free Advocacy Strategy Tool



# Template MUST WIN BATTLES Form

## OPPORTUNITIES & RISKS

Country	Issue	Product Category Business Unit	Likelihood (See note 1)	Likely Timing (See note 2)	Annualised Impact (£\$) (See note 3)	Is impact a one off or recurring? (See note 4)	Notes
MUST WIN Core							
FR	AS A		High	01/10/2023	12,000,000	Recurring	
BE	AS B		Med	01/01/2023	400,000	Recurring	
DE	SUD		Low	01/03/2022	1,000,000	One-off	
SWE	MRLs						
MUST WIN Transition							

### Notes:

- Likelihood of issue materialising in calendar or financial year
- Likely date that impact could first be felt i.e. law enters into force or grace/transition period ends
- Include an approximate financial impact if the issue materialises (red font for a negative impact, green font for a positive impact).
  - Where a commercial opportunity involves others outside of public affairs (e.g. a product launch), use the annual impact of the whole opportunity to indicate the impact. However, you should also make this clear in the notes
- State whether the event has a one off impact (such as a fine) or is recurring (such as annual tax or product ban)

Things to  
Map Out

Market  
Issue  
Product Category

Likelihood

Timing of Impact

Annualised Impact

One off or  
recurring

To be updated  
every quarter

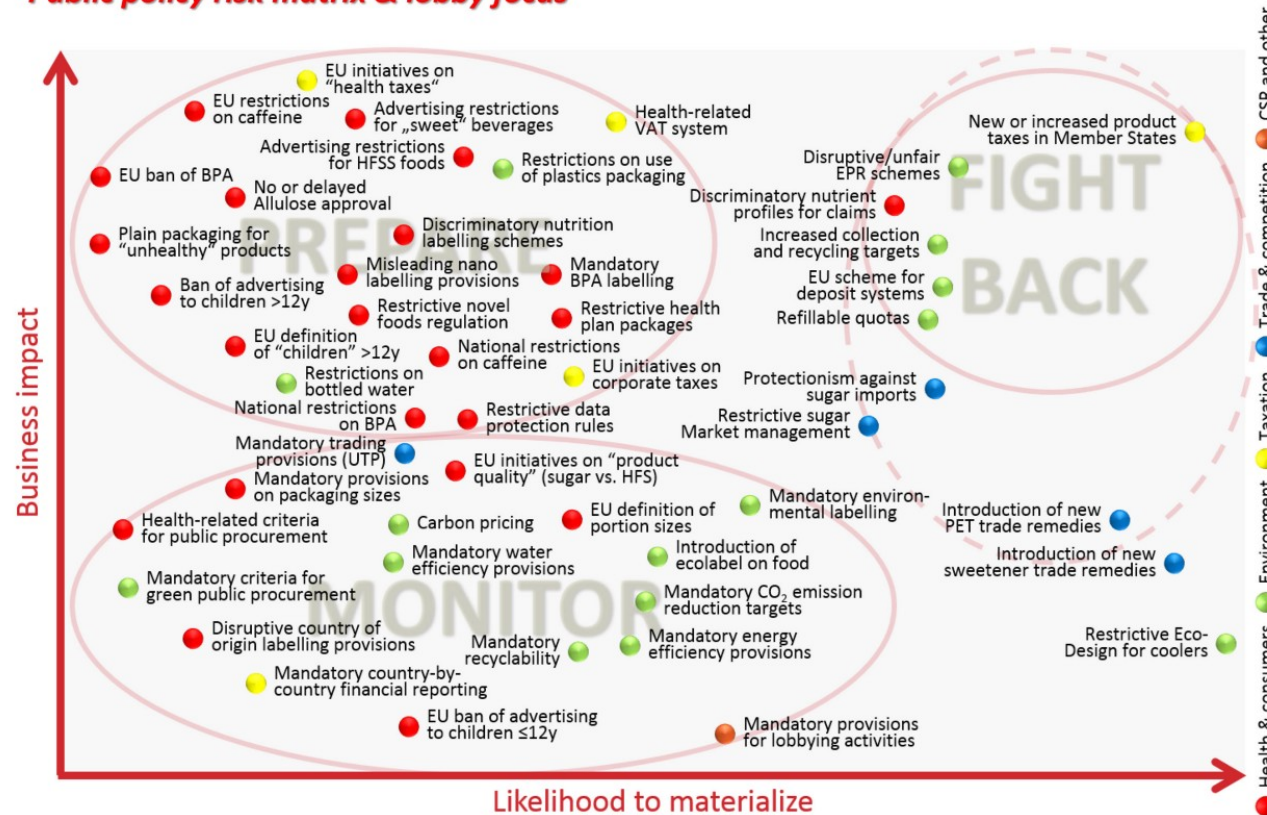
# Visualizing Priorities

European Union							
Search for campaigns, contacts, issues, and more...							
Issue Influence Evaluation							
<span>Visualize</span> <span>Settings</span> <span>Download</span> <span>New Column</span>							
	Issue	Image	Commercial	Impact to Business	Positioning in EU ...	Advocacy Chann...	Scope
1	Agriculture	1	4 ██████████	High	Emerging	Consultancy Only	
2	CO2 emissions - California	4 ██████████	1	High	Emerging	Associations	All motor vehicles.
3	CO2 emissions - EU	2 █████	3 ████████	High	Leader	Consultancy only	Targets set for 2030
4	CO2 emissions (Global)	3 ████████	4 ██████████	Medium	Active	In house team, consultancy, associations	
5	COVID-19 - Germany	3 ████████	4 ██████████	High	Active	Associations, Local Team	
6	Energy	2 █████	3 ████████	Medium	Active	Consultancy Only	
7	ePrivacy	4 ██████████	2 █████	High	Leader	In house team	
8	Glyphosate - EU	1	2 █████		Active	In house team	
9	GMOs	2 █████	3 ████████		Absent	In house team	



# Example: Priorities

Public policy risk matrix & lobby focus



Classified - Internal use





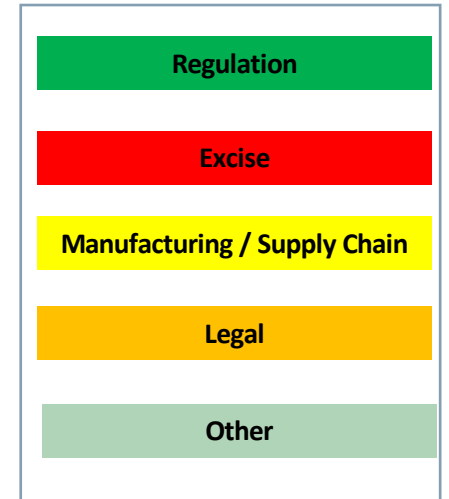
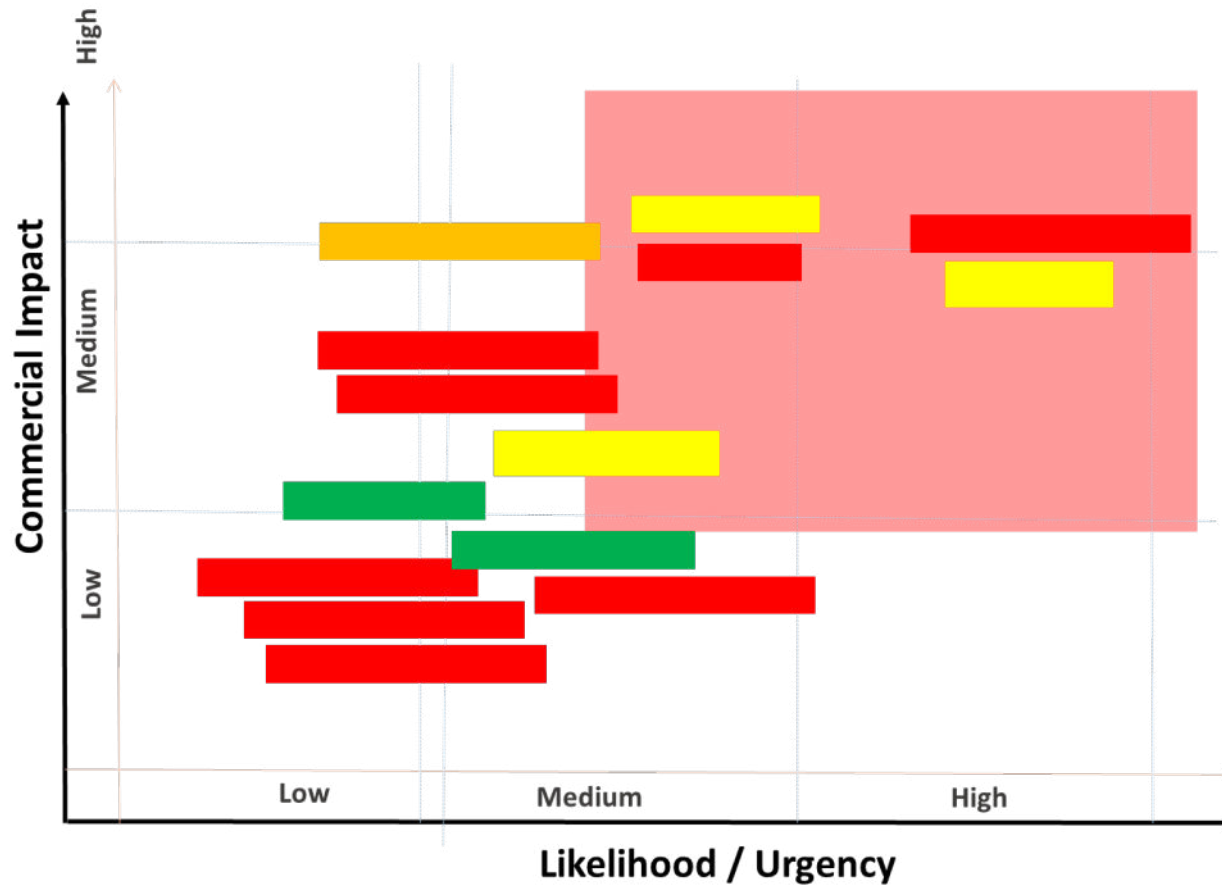
# Example: Priorities



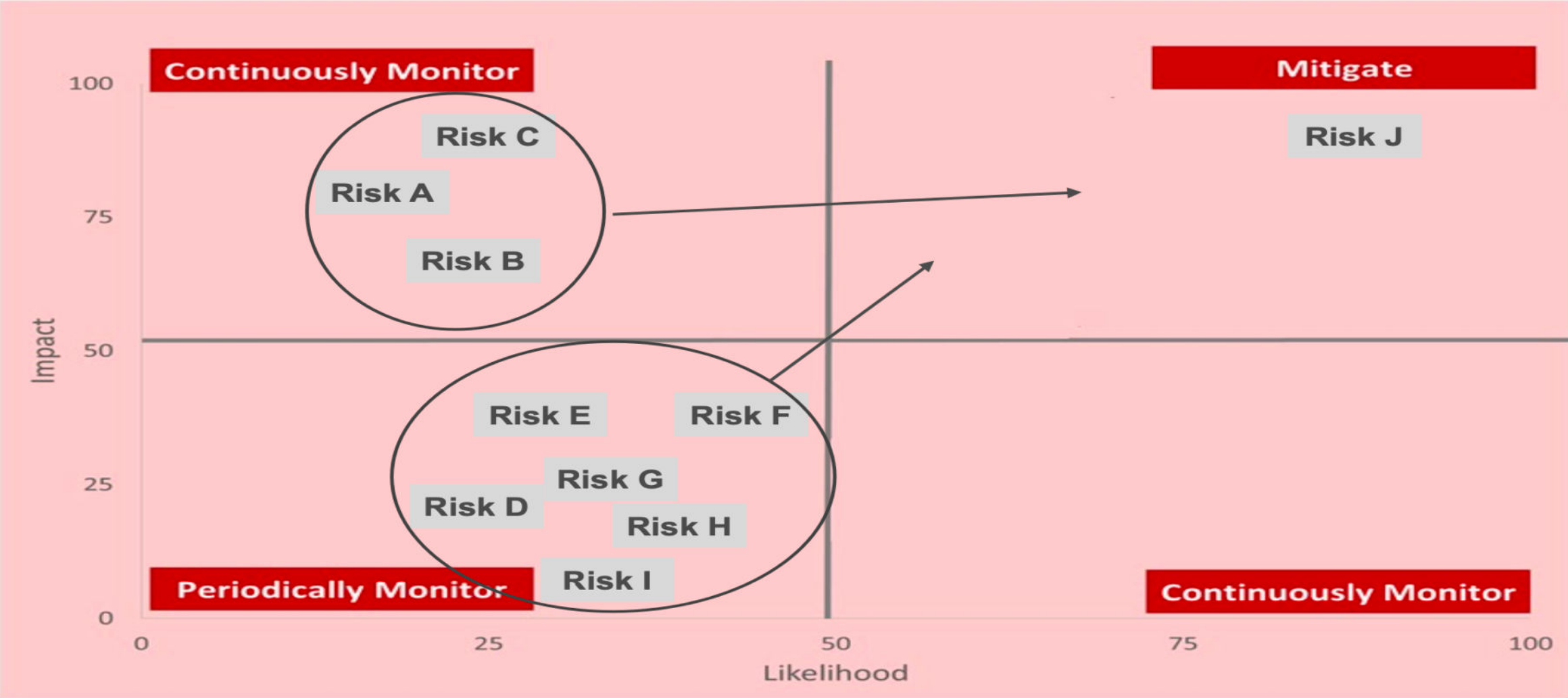
# Commercial Impact vs Urgency Matrix

Total \$\$  
Impact:

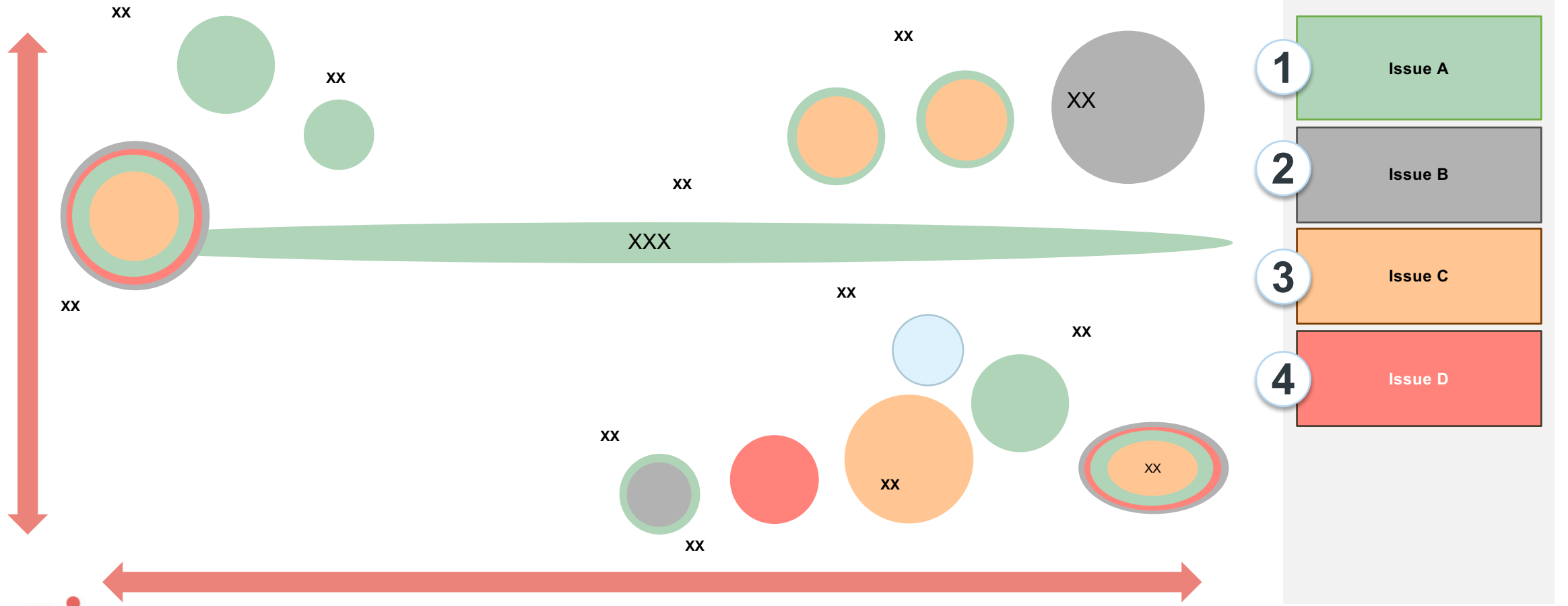
Focus Zone  
\$\$ Impact:



# Monitor-Action Map



# Opportunities and Risks Heatmap



# Preparedness / Threat Matrix

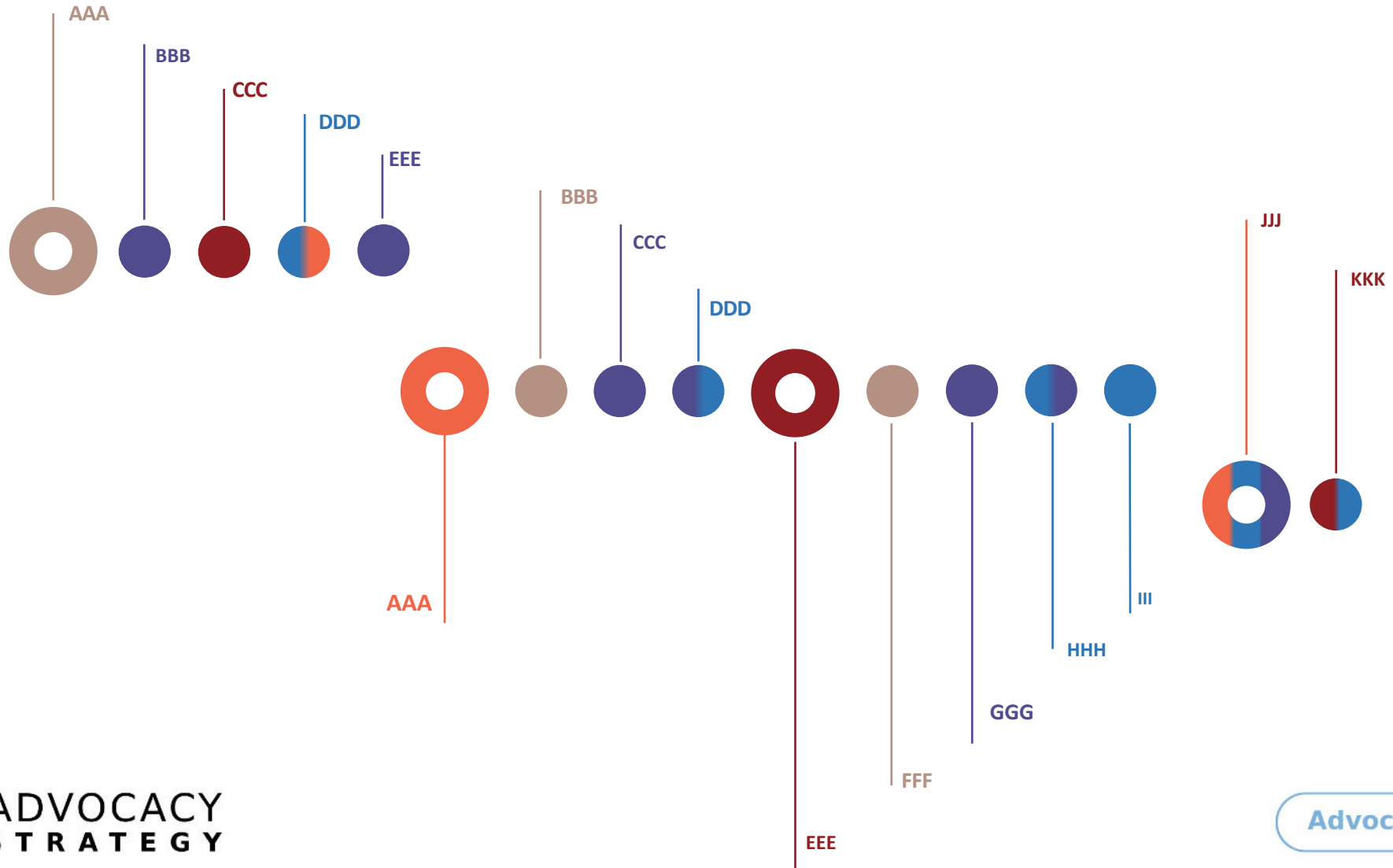
		Preparedness / Threat Matrix						
Preparedness Score <sup>1</sup>	High	11						
		10		D		A	Issue Z	
		9						
		8						
		7						
		6				Issue X		
		5		C		B		
		4				Issue Y		
		3						
		2						
	Low	1						
Preparedness Score <sup>1</sup>			<b>Stage 1</b>	<b>Stage 2</b>	<b>Stage 3</b>	<b>Stage 4</b>	<b>Stage 5</b>	<b>Stage 6</b>
			No Discussions of issue	Occasional Mentions of issue	Media & Public Attention on issue	Active engagement on issue	Clear Govt. Plan on issue	Legislative proposal on issue
Threat <sup>2</sup> (Legislative)			No Immediate Threat				Immediate Threat	

<sup>1</sup> Input Preparedness score – how prepared are you as an organization on this issue. 1 = nothing prepared 11 = full strategy, plan, materials ready

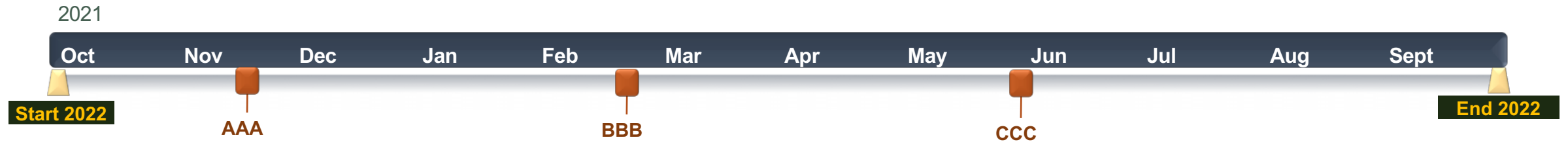
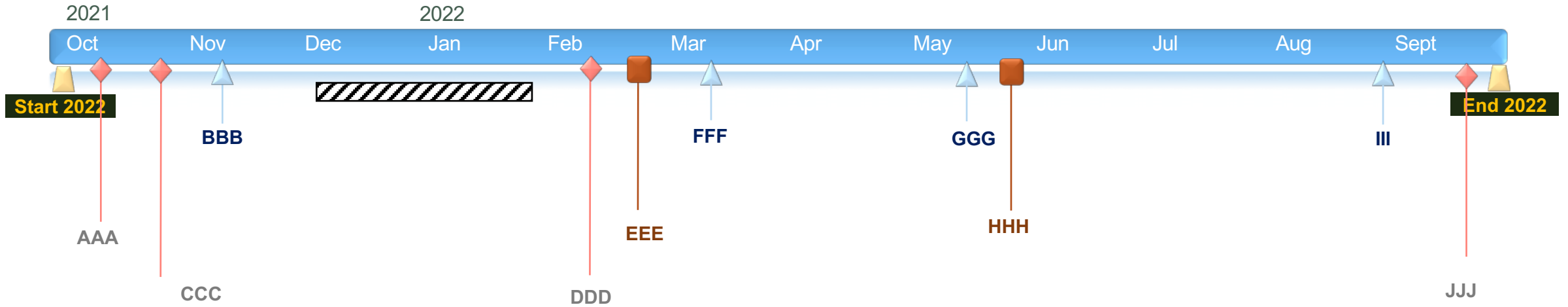
<sup>2</sup> Input Threat level – in which Stage is the issue you are looking at



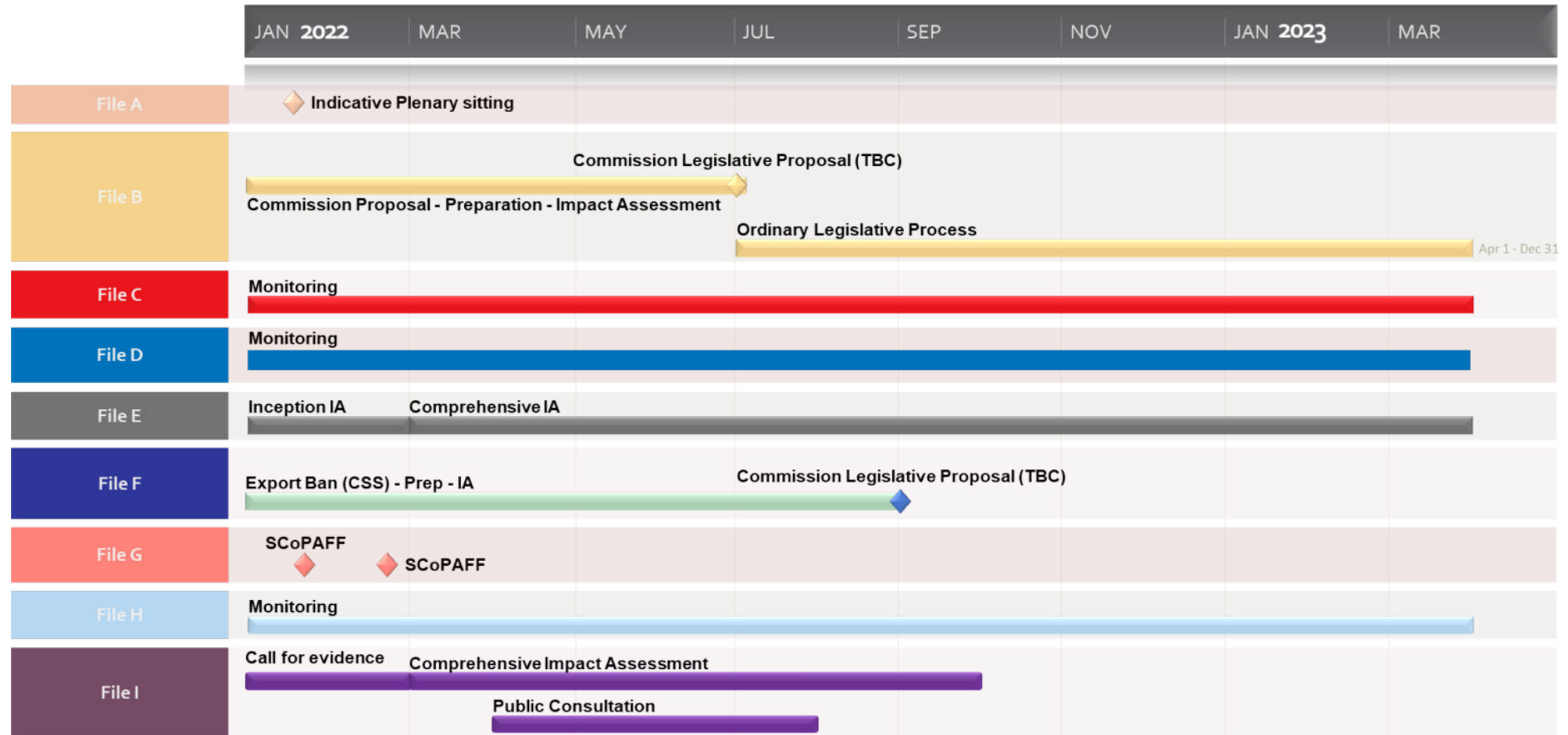
# TIMELINE A



# TIMELINE B

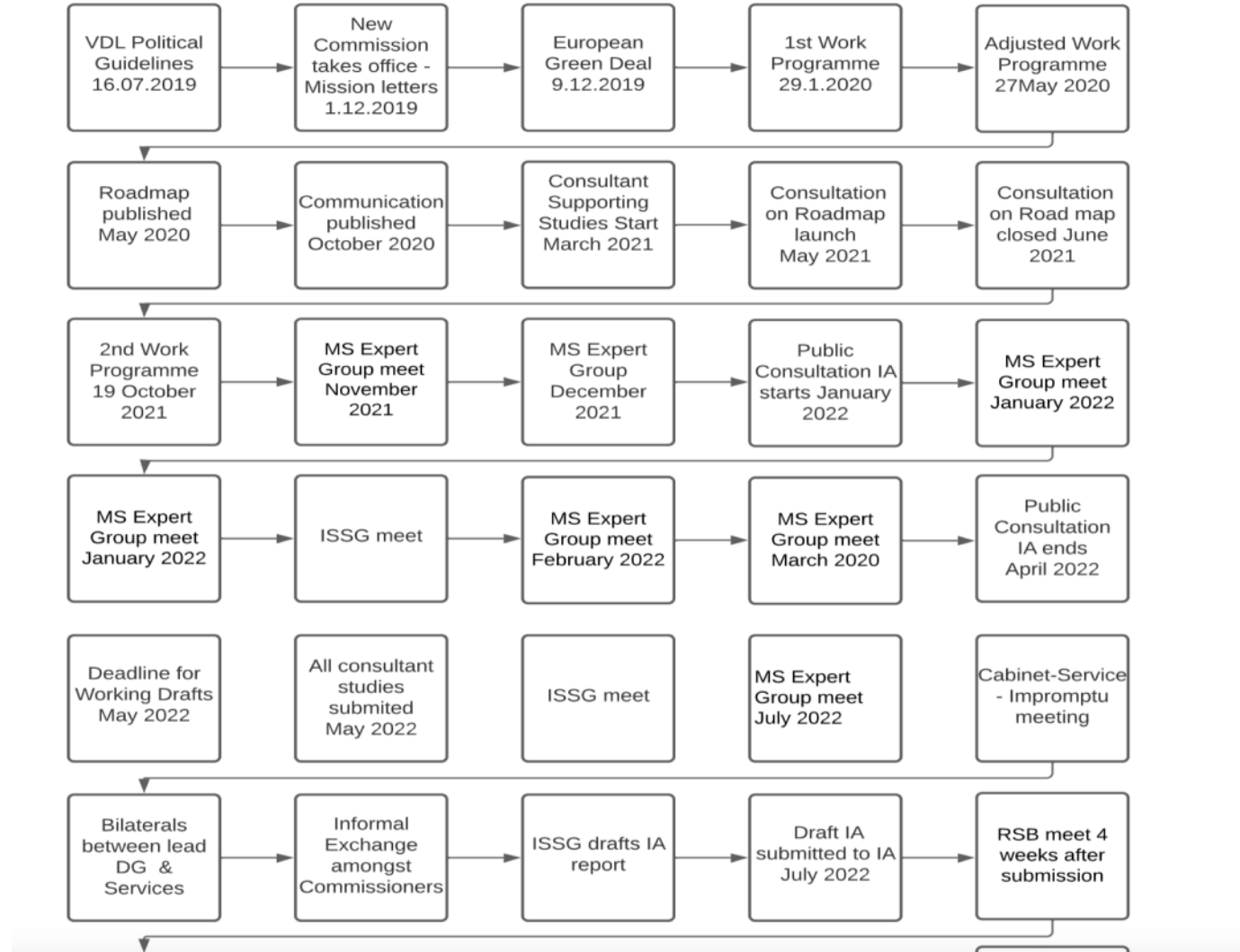


# TIMELINE C





# TIMELINE D



# OBJECTIVES & KPIs

## Defining Objectives



SMART – Clear – Realistic – Link to organisation

How do you currently determine your advocacy objectives?

Do you focus on outcome or process?

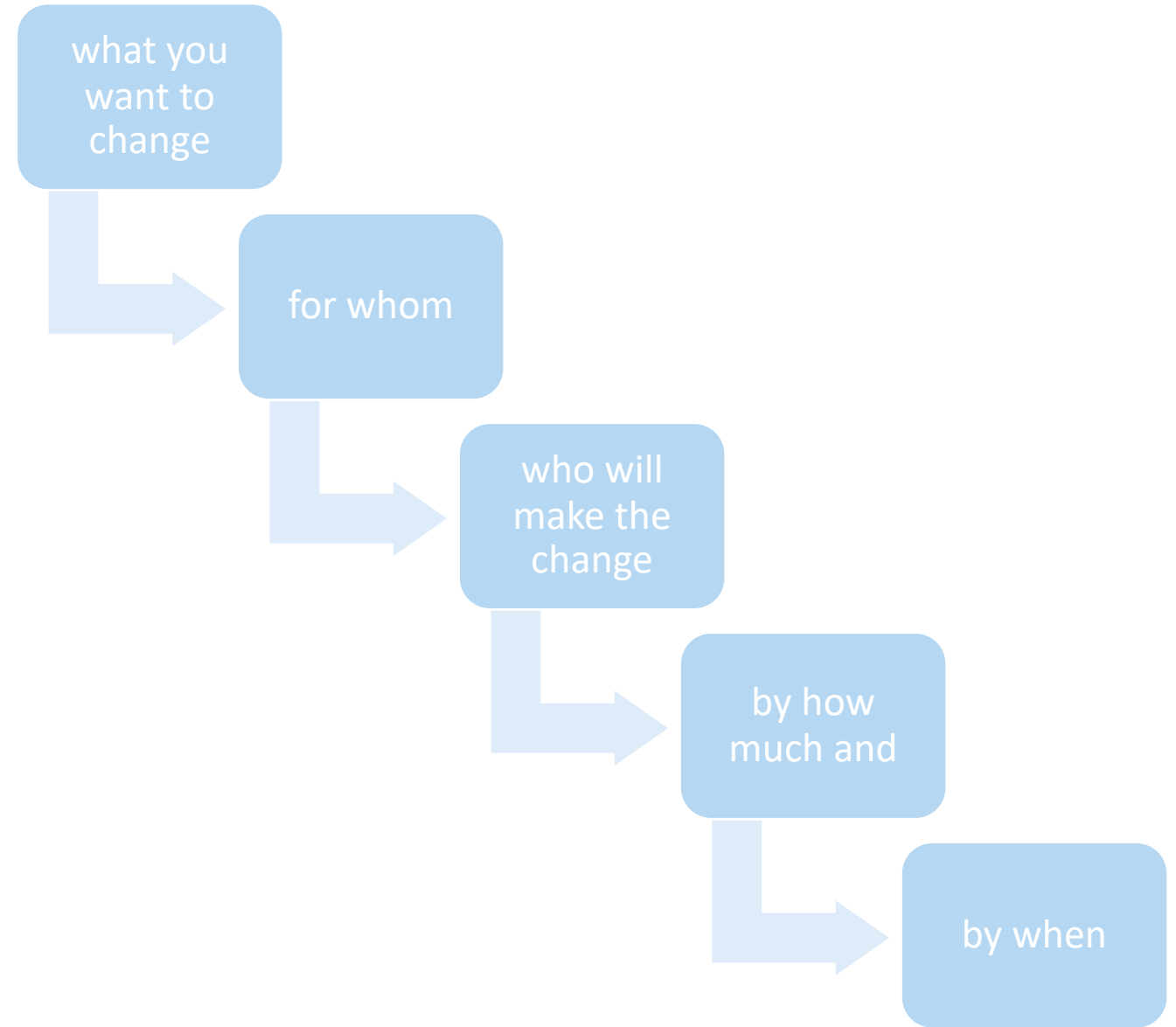
Can you share 1-2 of your objectives?



# Strategic & Specific

An advocacy objective aims to change the policies, programmes or positions of decision-makers (at any level).

Your advocacy objective is determined by:



# Defining Objectives

Using your impact analysis, **define objectives** and **priorities** for changes you might want to the text?

How **realistic** are your objectives and priorities? Can you **rank them**?

What do you want to change? What do you want to change it to?

Are the objectives negotiable or non-negotiable?

- Define what can be bargained away and what cannot.
- Are your objectives SMART?

# S, M, A, R, T Objectives (with variations)

## 1. Specific (Stretching)

Is description  
clear and  
detailed?

It is stretching  
but  
achievable?

## 2. Measurable

Does it say  
what success/  
progress looks  
like?

Does it say how  
success will be  
measured?

## 3. Achievable (Agreed / Attainable)

Is it realistically  
achievable, but  
not too easy?

Have you  
agreed  
objective with  
manager?

## 4. Relevant (Results Orientated / Realistic)

Is it relevant to  
business goals?

Can it be  
achieved?

## 5. Timebound (Tangible)

Does it have a  
completion  
date?

Is the deadline  
relevant to the  
objective?

# Setting SMART Objectives

## Specific

Change-oriented language and avoid activity-focused language

Avoid Jargon & Rhetoric

Avoid words with multiple meanings

## Measurable

Who, What, Where, When, How. Who affected, geographic scope.

Manageable numbers to ensure concept understood.

## Achievable

Be clear about your 5Ws and 1 H

## Results Orientated

Goals should be achievable in timeframe and with available staff

Include interim outcomes. Steps towards the goal

## Time bound

Provide a clear timeframe





# Specific Objective Setting

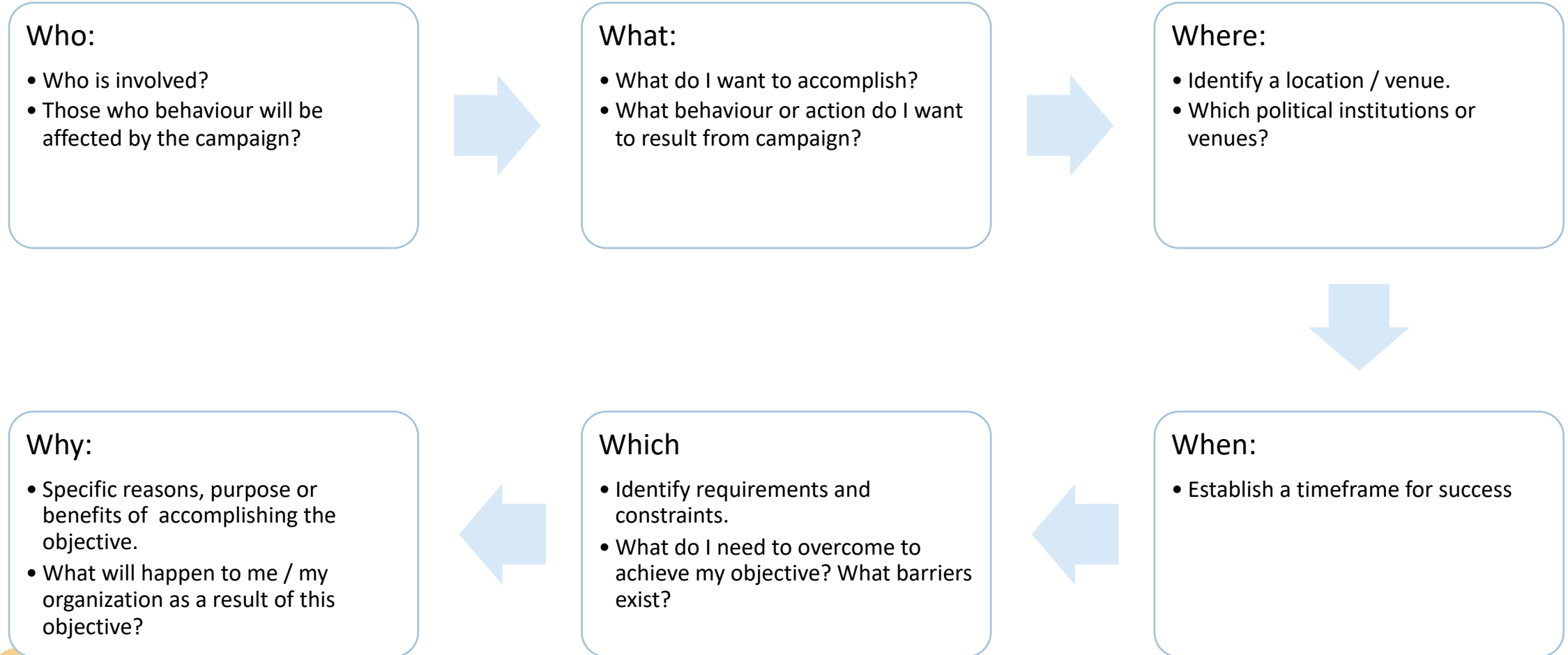
- Describes what you want to accomplish with as much detail as possible
- Vague objectives lessen the possibility of attaining them e.g.:

I want to win a campaign

I want to have a good regulatory environment

I want to improve my reputation

# Creating Specific Objectives (6Ws)



# Measurable Objective Setting

- Describes objectives in terms that can be clearly evaluated
- No measurement means that task, objective or goal will never be attained e.g.

I want to campaign on the circular economy

I want the European Parliament to set minimum recycling requirements for concrete at 40% for construction products within the revised CPR.

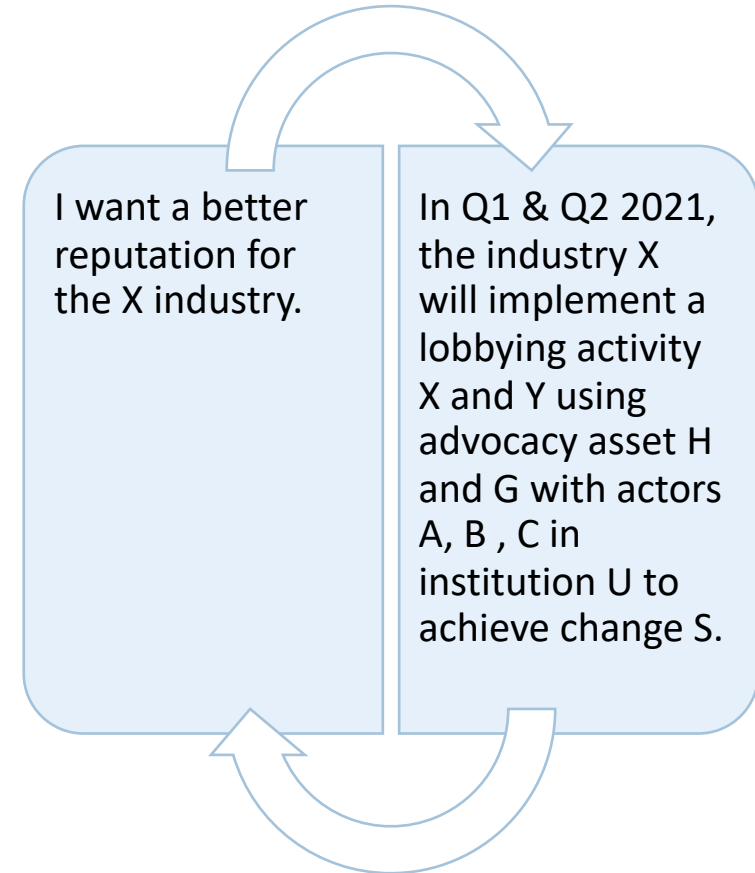
If it can't be expressed in figures, it is not science; it is opinion

# Achievable Objective Setting

Identify an objective that focuses on achievable actions.

- Can you deliver within the expected timeframe? Is it too easy?
- Do you have enough financial resources?
- Do you have enough staff / expertise?

Objective must have an achievable action in order to complete it:



# Relevant Objective Setting

Do your objectives align with your organization's mission and vision?

Do your objectives align with your organization vision of its future and its long-term objectives?

Does your objective improve your organization in some way?

Extra (Realistic): Objectives and goals must be challenging, but not unrealistic

# Creating Relevant Objectives

## Questions to determine if your objective is relevant:

Will this objective secure my organization's long-term future?

Why is this objective significant?

It is worthwhile?

Is this the right time?

Does it align with other efforts / needs?

# Timebound Objectives



The timber industry will implement a meeting programme...



In Q1 & Q2 2023, the timber industry will implement a meeting programme...

- Identifies objectives that break a longer-term goal into shorter term objectives and clearly specifies a completion date.
- An objective should be grounded within a timeframe. With no time frame tied to it, there is no sense of urgency.
  - When will I achieve this objective?
  - When will the activities be undertaken?
  - When can I expect to see outcomes?
  - How do the activities align with the policy process?

# Good Public Affairs Objectives

Focus on outcomes but do not ignore process (not outputs)

Focus on impact (not quantity)

Tie in explicitly to organisational priorities


Have a clear line of sign to financial implications if achieved (or not)

Build into ROI delivery



# Example

**Original Objective:** Change the legal text to improve health services in rural areas to reduce child mortality.



**SMART Objective:** Ensure the legislation states that by 2023, 50 per cent of children will be covered by high-quality essential health services, with the components of these services clearly defined and agreed benchmarks used consistently to assess quality.

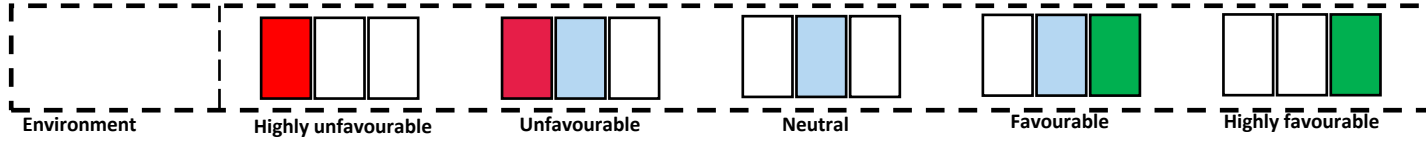
# OBJECTIVES & KPIs

## Managing Priorities & Objectives



SMART – Clear – Realistic – Link to organisation

# 2030 Dashboard



PA Priorities		Risks-Opportunities: \$XX			
Overall Objective: XXX					
Issue	Sector / Business Unit	Status			\$m Impact
Issue A	AAA	[Red]	[Blue]	[ ]	1
Issue B	BBB	[ ]	[Blue]	[Green]	2
Issue C	CCC	[ ]	[Blue]	[Green]	3
Issue D	DDD	[ ]	[Blue]	[Green]	4
Issue A Issue...	EEE	[ ]	[Blue]	[Green]	5
	FFF	[ ]	[Blue]	[Green]	6
	GGG	[ ]	[Blue]	[Green]	7
	HHH	[ ]	[Blue]	[Green]	8
	III	[ ]	[Blue]	[ ]	9
	JJJ	[ ]	[Blue]	[ ]	10
	KKK	[Red]	[ ]	[ ]	11
	LLL	[ ]	[Blue]	[Green]	12
	MMM	[ ]	[Blue]	[Green]	13



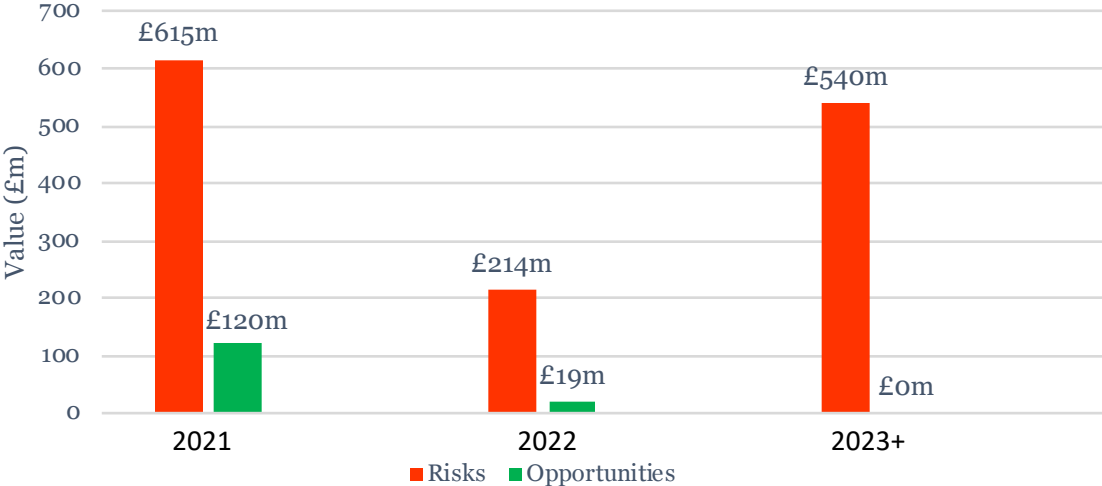
Issue	Key Wins	Total: \$XX
✓ Issue A: (\$XX)	✓ X	
✓ Issue B: (\$XX)	✓ X	
✓ X	✓ X	
✓ X	✓ X	
✓ X	✓ X	



# Executive Summary – Template

- 1. **Total PA Risks under management:** identified year by year and total
- 2. **Total PA Opportunities:** identified year by year and total
- 3. **2021 Focus:** Risks XX Opportunities YY
- 4. **2022 Focus:** Risks XX Opportunities YY
- 5. **Longer-term 2022+:** Commercial Risks =
- 6. **XX** is the biggest issue to manage across our footprint; **YY** is the country most at risk / with the most opportunity ... highlight key themes and any major items

Public Affairs Opportunities and Risks



		Total	Europe	RoW	US
2021	Total Risks	-£615m	-£305m	-£310m	-
	Total Opportunities	£120m	£60m	£60m	-
2022	Total Risks	-£214m	-£0.5	-£113m	-£100m
	Total Opportunities	£19m	£0.5m	£4m	£14m
2023+	Total Risks	-£540m	-£25m	-£15m	-£500m
	Total Opportunities	-	-	-	-



# How to Work with the EU Institutions

A Practical Guide to Successful Public Affairs in the EU

'this comprehensive book provides guidance for successful EU advocacy'

*Doug Pinkham, President,  
Public Affairs Council*

edited by  
**Alan Hardacre**

Framework for how to think about prioritization

Tools to help you do the work

Visuals to bring priorities to life

Timelines to structure priorities in time

Objectives and KPIs to deliver priorities

With plenty of examples and ideas