ADVOCACY
Strategy

MASTERCLASS · STRATEGIC PLANNING

Public Affairs Planning for 2027

From a planning framework to a Public Affairs operating system.

ADVOCACY STRATEGY | 17 SEPTEMBER 2026 | PLANNING FOR 2027

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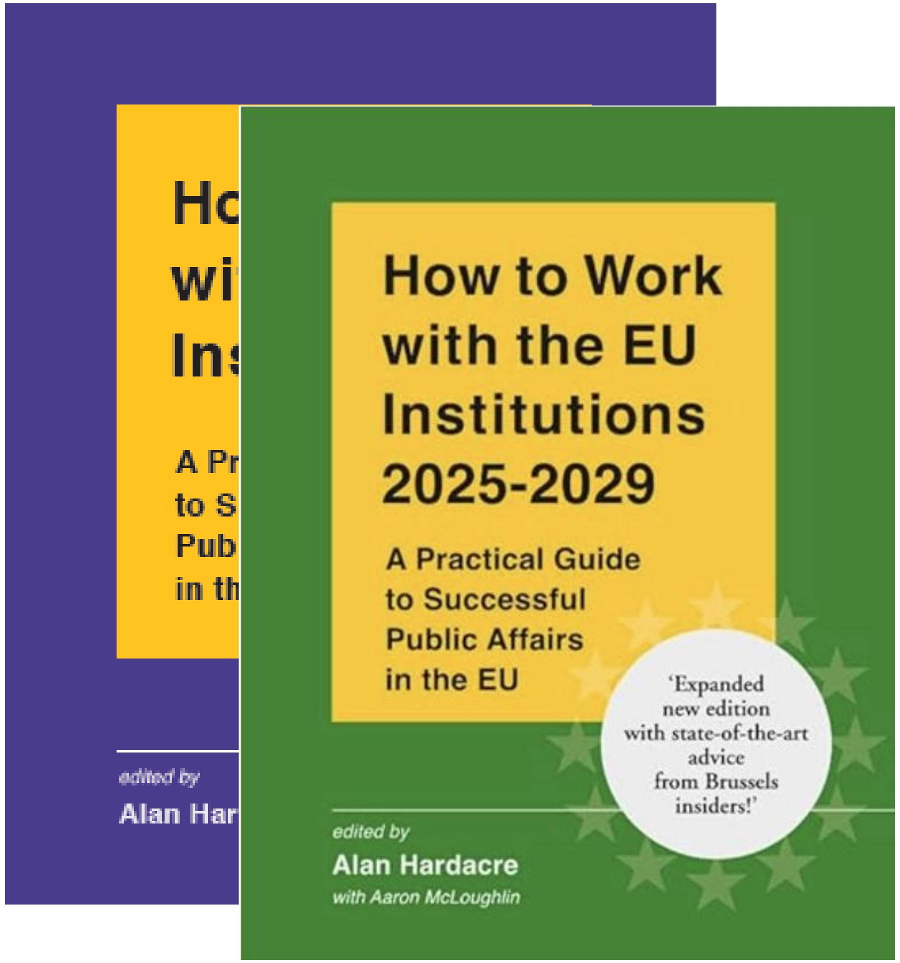
ADVOCACY Strategy

- Co-founder of Advocacy Strategy / Lanzcape
- Passionate about professionalizing Public Affairs
- Consulting, teaching, coaching on Public Affairs
- Ex-director of Corporate Affairs @ Imperial Brands
- Over 25 years Public Affairs experience
- Author of several articles & books
- Long time Board Member of Public Affairs Council
- Visiting Professor in UK, Thailand, Switzerland, Belgium, Netherlands



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Most Public Affairs plans fail before January

Not because teams work too little — but for four structural reasons that repeat every year.

01

Too many priorities

Everything is important, so nothing is. Effort is spread thin across issues no one chose deliberately.

02

Activity, not outcomes

Meetings, papers and consultations counted as progress — with no line to a business result.

03

Disconnected from the business

The plan lives in the PA team, not in the boardroom. It protects no clear commercial interest.

04

Impossible to measure

Success is a story told after the fact — never a number agreed in advance with the executive.

Strategic Planning and Alignment is a challenge that the Profession is <u>not</u> meeting

From **"Shape the Policy Environment"**
"Improve Reputation"
"Manage External Risks"
"We held a successful event"
Too vague…no tangible measurement…no clear impact…hard to communicate success

To **Demonstrate tangible value-impact**
Results-driven performance
Measure & Quantify our impact
To thrive and grow as a function we need more data, more accountability, more measurement and better communication

Today, we look at a planning system for 2027

INSTEAD OF MANY

Deliberate priorities

INSTEAD OF ACTIVITY

Business outcomes

INSTEAD OF SILOED

Boardroom-aligned

INSTEAD OF ANECDOTE

Measured value

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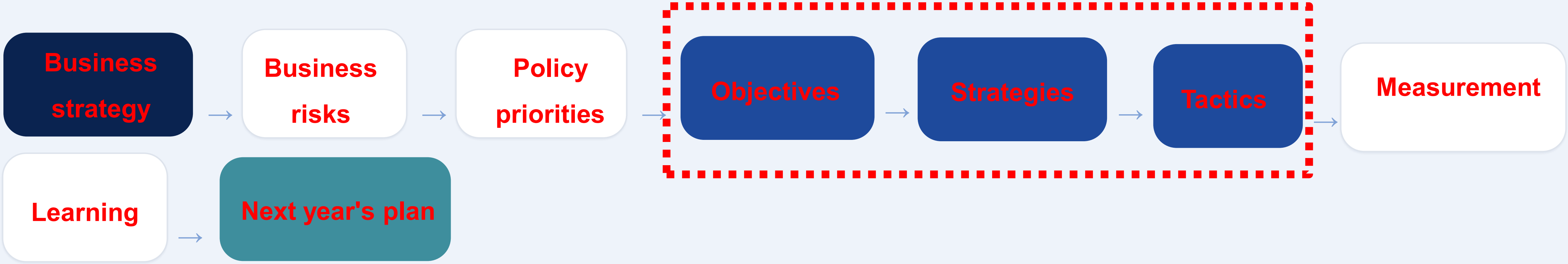
Get the flow right

Each link answers the question the one before it raises.



Most people focus on the middle three boxes. The value — and the judgement — lives at the two ends: **choosing what matters** and **showing / proving it worked.**

What a structured Public Affairs Plan needs to look like

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#	Element	Comment
1	Context	The business, political, and regulatory environment — what's changed since the last plan; the "why now."
2	Business Objectives	The corporate strategy and business priorities PA exists to serve — the anchor everything else is judged against.
3	Issues & Priorities	Issues identified, scored, and prioritised; the "battles worth fighting" given finite resources.
4	PA Objectives & KPIs	SMART+ objectives translating business outcomes into measurable PA targets.
5	Strategy	Where to play, how to win — positioning, coalitions, framing; the judgement layer, not just activity.
6	Tactics & Engagement Plan	The concrete actions and channels for the year — treated as instruments of the strategy, not a to-do list.
7	Timeline & Milestones	Sequencing across the year — key dates, decision points, and checkpoints tied to the tactics above.
8	Governance & Team	Roles/RACI, rhythms, budget, tools — how the plan is actually run and resourced.
9	Measurement & Reporting Dashboard	How value will be tracked and shown to executives — the specific dashboard/cadence, not just "we'll measure it."

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Agenda

01 **Why Public Affairs planning is a challenge**

Executive expectations, a shifting environment, and AI.

02 **Choosing the right battles**

Issue identification, prioritisation, business alignment.

03 **Designing outcome-based objectives**

SMART+, business outcomes, and KPIs.

04 **Building winning strategies**

Where to play, how to win — and what not to do.

05 **Executing through tactics**

Classifying tactics as strategic tools, not a to-do list.

06 **Running the operating system**

Governance, teams, dashboards, rhythms, AI support.

07 **Measuring value and adapting**

Executive reporting, lessons learned, planning for 2028.

Plenary Questions

What challenges do you encounter with your internal strategic -annual planning?

Do you have any examples of things you have done that have changed this / been successful?

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01

Why Public Affairs planning is a challenge

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Think like an executive

Executives / Boards do not want activity. It wants outcomes it can put a number against.

WHAT THEY DON'T WANT

- Meetings held
- Consultations answered
- Position papers written
- Events attended

WHAT THEY CARE ABOUT

→ **Revenue**
→ **Cost**
→ **Risk**
→ **Licence to operate**
→ **Growth**
→ **Competitive advantage**

Our job is translation — turning every activity on the left into a claim on the right. We need to make our work relevant to their work in a meaningful way.

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Every Public Affairs plan should answer one core question —

“What business outcomes does this plan protect or create?”

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The annual plan is obsolete by Q2

Three forces make static, once-a-year planning a liability rather than a discipline.

Volatility

Elections, reshuffles and crises redraw the map mid-cycle. The stakeholder you planned around is gone by spring. The priority in October is no longer valid in January.

Regulatory acceleration

Files move faster and overlap. Implementing acts and reviews open windows that close before an annual plan reacts.

AI-speed information

Monitoring is now continuous. Teams that still plan once a year are reacting to intelligence everyone else already acted on.

02

Choosing the right battles

The hardest question in Public Affairs is not “what should we do?” It is “what will we **not** do?”

G.O.S.T FRAMEWORK

INPUTS

GOALS
are ideal future states, long-term **aspirations**

OBJECTIVES
are specific intended **outcomes**

OUTPUTS

STRATEGIES
are specific informed **choices**

TACTICS
are specific **actions**

EXPLORATION

RESEARCH AND ANALYSIS
is the collection and examination of data to determine what is important and why (insights)

INTERPRETATION

POINT OF VIEW
is the statement of beliefs & insights that motivate and justify the main idea or program

TRANSLATION

CREATIVE PLATFORM
is an expression of the main idea or program that tells a story, unifies activity and creates interest

G	H	O	S	T
Goal	**How**	**Objectives**	**Strategy**	**Tactics**
ABC	PA Team	Objective 1	Trade Associations	Events
ABC	GMs	Objective 2	Communications	Research
ABC	Training Support	Objective 3	Echo Chamber	Conferences
ABC		Objective 4		

Public Affairs Best Practice

Internal Alignment
Mission-Vision
Org Chart
Ways of Working
Internal R&R

Public Affairs Priorities & Objectives
Identify
Capture
Quantify
Prioritize
Tiers
Objectives
KPIs

Business Input / Coordination
Steering Group
Process to get info

Public Affairs Budget
Annual Planning
Structure
Tracking
Link to Objectives-KPIs

(Annual) Public Affairs Plan - Strategy
Annual Plan
template
Sign-off

Internal Reporting
Weekly
Monthly
Quarterly
Annual
Ad-hoc
Structure – Format
Dashboards

Internal Position Statements
Internal Policy Papers
Process to develop &
sign-off

Information Management
Storage
Access
Platform
Structure
Use of AI
AI Policy

Monitor & Intelligence
Capture
Timelines
Issue Sheets
Alerts
Reports
Trackers

Stakeholder Mapping & CRM
Identify
Mapping
CRM
Visuals

Messaging
Position Paper
Message House
Messages
Speaking Points
Meeting Prep
Focus Groups

(In)direct Engagement
Mapping
Choices
Leverage
Meeting Preparation

Alliances / Trade Associations
Leverage
Coordinate
Govern
Evaluate

Internal Leverage Coordination
Market
Coordination
Internal
Mobilization
Governance

Evaluation
Monthly
Biannual
Annual
Format-Structure

Ways of Working
R&R
Team Meeting
Agenda / Minutes

Public Affairs Team

Quarterly Team
Meeting Agenda
Off-Site-Strategic Sessions
Development Plans
Succession

Plenary Question

How do you determine your Public Affairs priorities for the year?

- We make them for ourselves
- In a yearly discussion with the business
- We are given priorities by the Executive
- We don't really have a clear process

Prioritisation is subtraction

Every issue must survive a narrower filter than the one before it.

Everything monitored ~40 files

↓ relevant to the business

Business-relevant issues 12

↓ material impact

Material issues 5

↓ where we can influence

True priorities 3

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Impact against influence

BUSINESS IMPACT

PREPARE INTERNALLY High impact, low influence. You cannot move it — so build readiness, scenarios and contingencies. High impact · Low influence	**ACT — TOP PRIORITY** High impact and you can influence it. This is where the plan, the budget and the best people go. High impact · High influence
IGNORE Low impact, low influence. Log it and move on. Do not let noise consume the calendar. Low impact · Low influence	**MONITOR / DELEGATE** Easy to influence but low stakes. Handle lightly, delegate, or let an association carry it. Low impact · High influence

ABILITY TO INFLUENCE →

What makes something not a priority?

Two traps that consume Public Affairs teams every year.

TRAP 1 — THE LOUD FILE

High political attention

↓

Low business impact

↓

Don't spend time on it

TRAP 2 — THE UNWINNABLE FILE

Huge commercial impact

↓

Impossible to influence

↓

Prepare internally instead

Meet Northwind Beverages

A European drinks maker — invented, but its situation is on hundreds of real agendas

THE BUSINESS STRATEGY

Growth is built on **premium, single-serve, on-the-go formats** — the fastest-growing and highest-margin part of the portfolio.

THE ISSUE THAT THREATENS IT

New EU **packaging reuse and refill targets** could restrict single-serve formats — putting the growth engine at risk.

ON THE MATRIX	Business impact	Ability to influence	Verdict
	High — €180m at risk	Medium–high	Act — top priority

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Prioritization Indicators

Issue:

- Any legislation, policy, or decision significant to your organization, broken down into detailed **sub-issues** (e.g., specific provisions or articles).

Impact on Organization/Clients:

- Assesses both **financial** and **non-financial** threats and opportunities for ACT and its clients.

Financial Impact:

- A focused evaluation on **quantifiable financial metrics** affecting the organization or its members.

First Year of Impact:

- Identifies the **compliance start year** for policies and legislation, with nuanced assessments for different effective dates.

Likelihood of Impact:

- Evaluates the probability of the issue being enacted into **legislation**.

Ability to Influence:

- Measures your organization's capacity to access key decision-makers and exert **influence** on legislation.

Prioritization Tiers

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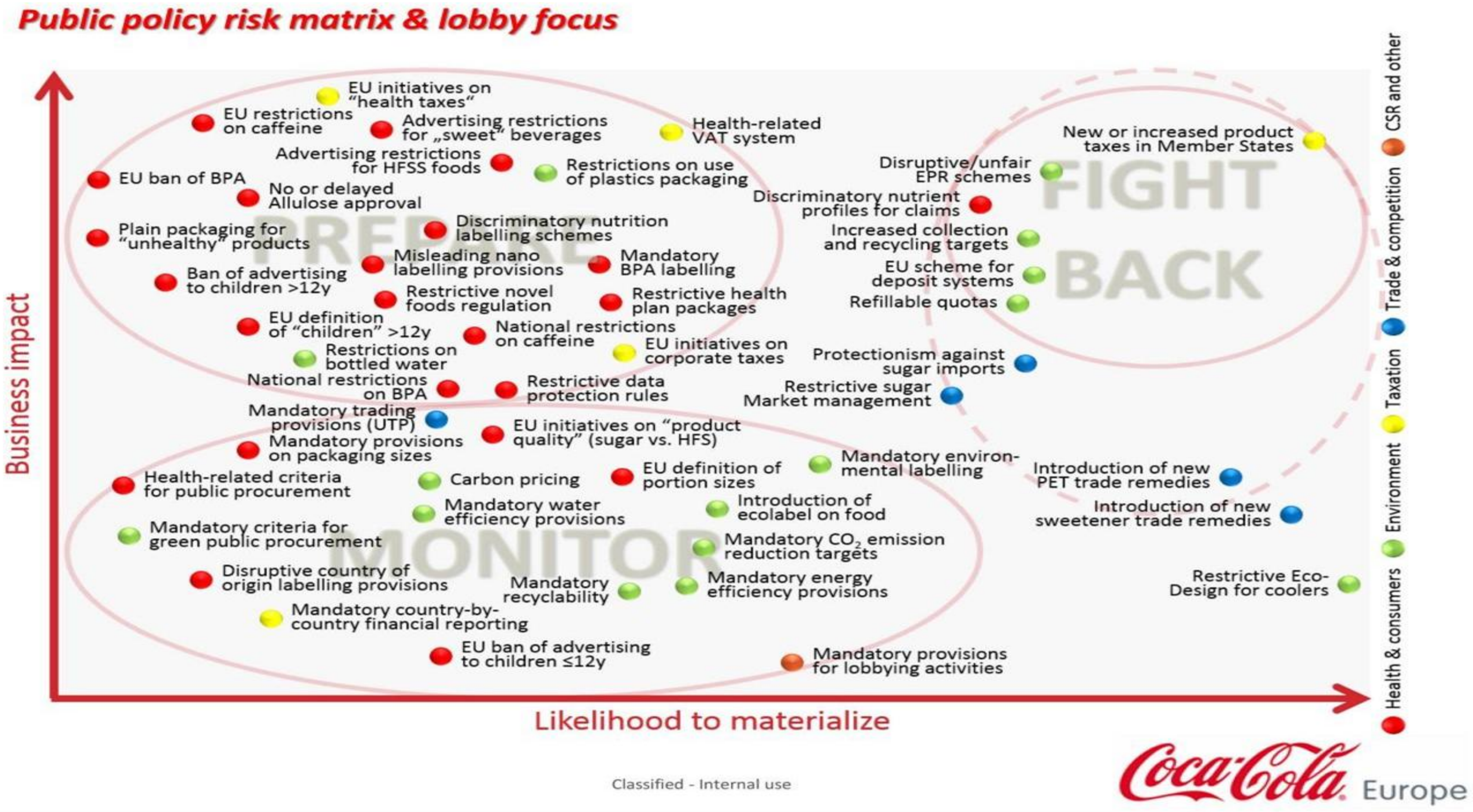
Issue Title	Region	Est. Entry into Force	Commercial Risk	Commercial Opportunity	Combined Score	Ability to Influence
Issue A	Japan	2026	5	5	5	3
Issue B	USA	2025	5	5	5	2
Issue C	USA	2024	4	5	4,5	5
Issue D	EU	2026	5	4	4,5	3
Issue E	EU	2025	3	3	3	3
Issue F	Japan	2026	3	1	2	2

Tier 1
Proactive Strategic Issues

Tier 2
Reactive Operational Issues

Tier 3
Monitoring

Case Study: Coca Cola



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Mechanism to Keep Priorities LIVE

- Need a regular way to ensure priorities are current
- Need to ensure you do not suffer from issue and priority creep
- Develop a governance process / steering group to meet quarterly to keep a tight hold on this

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03

Designing outcome-based objectives

Most objectives fail because they describe **activity** — not the outcome they are meant to secure.

Plenary Question

What makes a good / bad Public Affairs Objective?

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Stop writing verbs. Start writing results

ACTIVITY

~~Build relationships~~

→

OUTCOME

Secure parliamentary support for amendment X before trilogue.

ACTIVITY

~~Raise awareness~~

→

OUTCOME

Win support in five key ministries to oppose proposal Y.

SMART — plus the one that matters most.

The “+” is the business outcome. Without it, you have a project plan, not a Public Affairs objective.

S

Specific

A named decision, file or vote.

M

Measurable

A threshold agreed in advance.

A

Achievable

Within your influence.

R

Relevant

Tied to a live business risk.

T

Time-bound

Anchored to a real deadline.

+

Business outcome

The revenue, cost or risk it protects.

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One file. One sharp objective.

NORTHWIND'S 2027 OBJECTIVE

Secure a workable reuse-target trajectory and a recyclate-based exemption for single-serve formats in the PPWR implementing acts by Q3 2027 — protecting **€180m of at-risk revenue.**

SPECIFIC

A named exemption in named acts.

MEASURABLE

Trajectory + exemption, or not.

TIME-BOUND

Q3 2027 — the drafting window.

+ BUSINESS OUTCOME

€180m revenue protected.

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04

Building winning strategies

Strategy is choice. If your plan has no “no” in it, it is not a strategy — it is a wish list.

Plenary Question

What are your main strategic categories in Public Affairs?

Three questions. The third is the one most plans skip

Where do we play?

Which arenas, institutions and moments in the process are worth your presence — and which are not.

How do we win?

The argument, the evidence and the alliances that actually move the decision your way.

THE DIFFERENTIATOR

Where do we not play?

The battles you consciously decline — so your resource concentrates where it changes the result.

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Things we will not do this year

Write it down. Get it signed off. Every “no” is a “yes” to something that matters more.

× **No broad awareness campaign**
Reach is not influence. It will not move this file.

× **No new coalition to build**
We join one that exists rather than run our own.

× **No local / regional engagement**
The decision sits at EU level this year.

× **No trade-association leadership role**
We contribute, but do not spend capital chairing.

Three yeses, three noes

WHERE WE PLAY & HOW WE WIN

→ Focus on	**Implementing acts** not the headline targets already agreed.
→ Concentrate on	**3 pivotal member states not all 27**
→ Win on	**Lifecycle evidence** allied with the recycling industry.

WHERE WE WILL NOT PLAY

✕ No fight on the	**headline reuse target**	that battle is lost.
✕ No	**consumer awareness campaign**	it will not move the file.
✕ No	**go-it-alone coalition**	We join the recyclers' bloc.

Strategy: Bridging from Objectives to Tactics

YOUR STRATEGY

What is your aspiration?

- What's your aspiration (goal) & envisioned outcome (objective)
- Your SMART objective? **What are you trying to achieve?**

Where will we play?

- Choose the right playing field, where will we compete?

Where:

- Which part of the legislative institutions are you targeting?
- Which stakeholders are critical, convincible and should be prioritized?
- what is the best timing, when should we engage?

Have a clear idea on where, with whom and when you want to engage on the file.

How will we win?

- What's your value proposition, your message? What's your advantage versus others?

How:

- what message are we using? What data and evidence do we need to back this up?
- Will we go for a broader public campaign or series of 1-1 meetings?

Determine how you will convey your argument, what you are trying to say and how you will say it.

What capabilities/tactics need to be in place?

- Your tactical execution & organizational readiness
- Your conclusions from the previous two questions will feed directly in your tactics when you decide what you are going to create and how you are going to disseminate it.

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Elements of a Good Strategy

Well aligned with objectives or organizational goals

Includes stakeholder perspectives, ideally based on data

Multi channel or multi approach where needed

Flexible and **adaptable**

Combining short-term immediate gains with a **long-term** sustainable outcome

Compliant and ethical

05

Executing through tactics

A tactic is not an activity. It is a strategic tool — chosen to close a specific gap.

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Seven families of tactic

Influence

Direct engagement with decision-makers and their advisers.

Evidence

Data, studies and economics that make the argument credible.

Mobilisation

Activating allies, customers and third parties to carry the case.

Communications

Narrative and media that frame the issue for the right audiences.

Coalitions

Shared platforms with those whose interests align with yours.

Political intelligence

Monitoring and forecasting to act before others react.

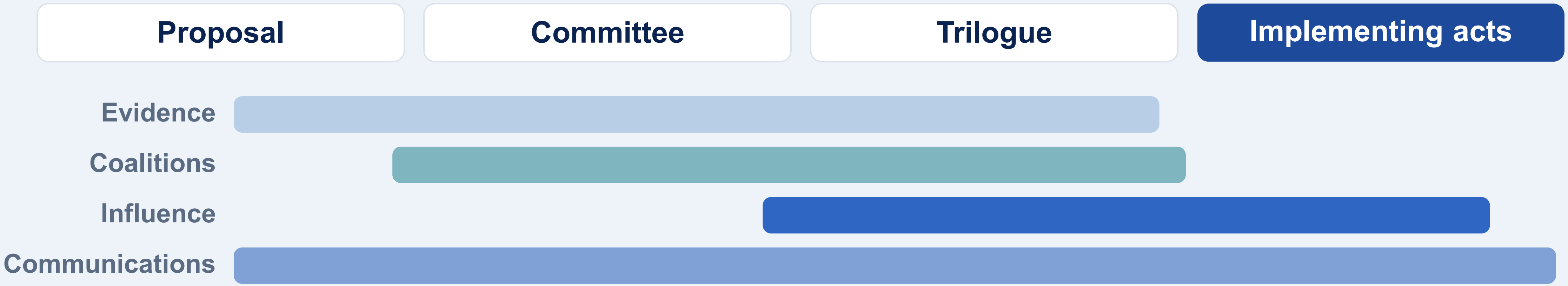
Capacity building

Skills, tools and internal readiness to sustain the effort.

Pick the **few** that serve the strategy. A plan that uses all seven at once uses none of them well.

The right tactic at the right moment

Sequence tactics against the process — not the calendar.



Four families active. Three switched off

ACTIVE

Evidence

Commission a lifecycle-emissions study on single-serve recyclate.

ACTIVE

Coalitions

Join the recyclers' bloc pushing the same exemption.

ACTIVE

Influence

Targeted engagement in three pivotal member states.

ACTIVE

Political intelligence

AI-assisted monitoring of the implementing-act drafts.

OFF

Mobilisation

OFF

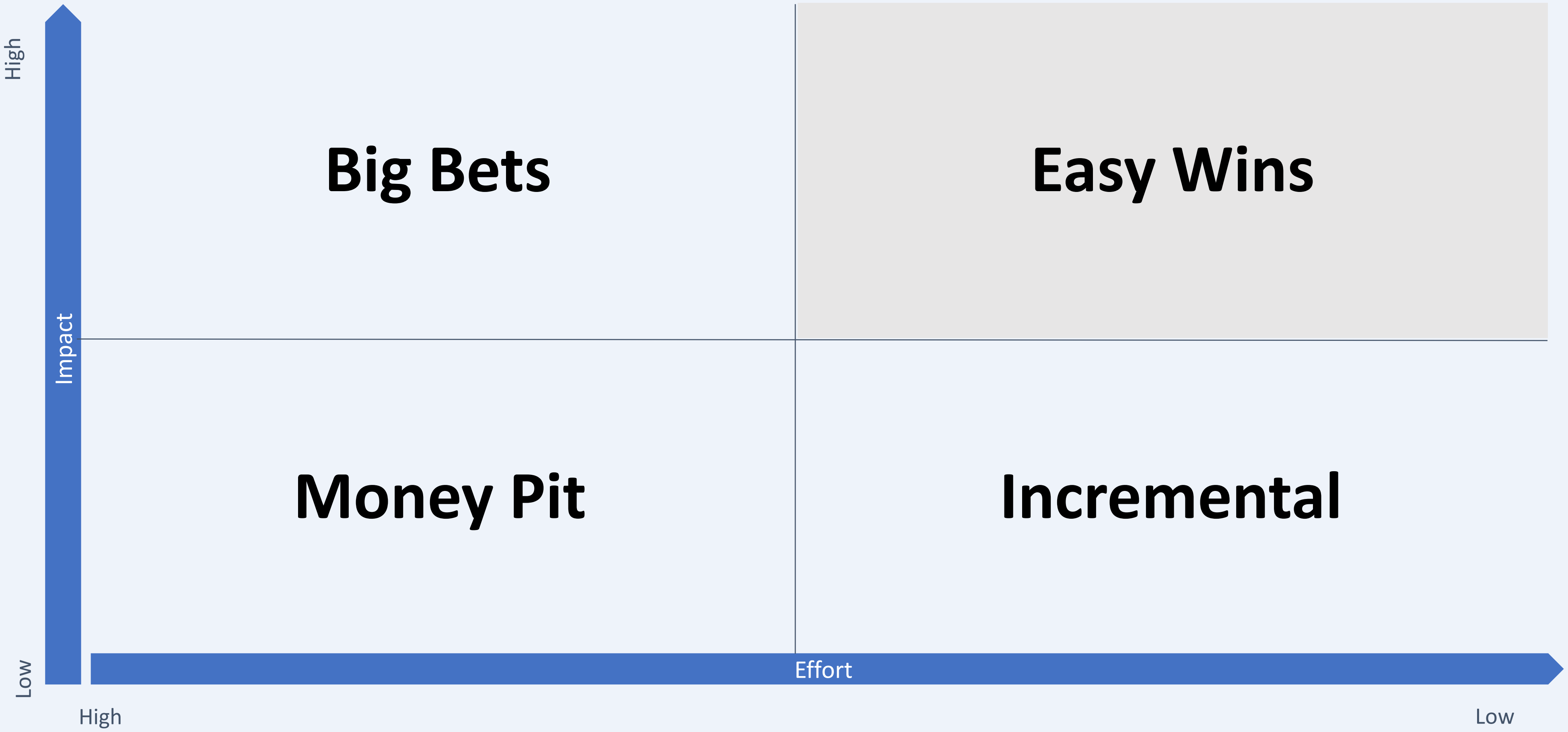
Communications

OFF

Capacity building

Fewer, sharper tactics — each earning its place against the objective.

Tactics Evaluation Grid



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06

Running the operating system

A plan is a document. An operating system is what makes the plan happen — every week, all year.

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Ownership plus cadence

The plan is not a document you write once. It is a rhythm you run.

THE OPERATING RHYTHM

WEEKLY
Intelligence scan
AI-assisted; what moved?

MONTHLY
Progress review
Objectives on / off track.

QUARTERLY
Re-prioritisation
Rerun the funnel.

ANNUAL
Plan & report
Value proven to leadership.

CLEAR OWNERSHIP

Executive sponsor / Steering Group – alignment / expectations and buy-in

Objective owners — accountable for the outcomes

Contributors — deliver the tactics

From reporting the past to anticipating the future

TRADITIONAL DASHBOARD

BACKWARD-LOOKING

Issues tracked	40
Meetings held	62
Consultations filed	9
Status	Amber

Answers: what did we do?

DASHBOARD — FORWARD-LOOKING

Predicted risk **Exemption at risk**	Likelihood **62% adverse**
Stakeholder sentiment **Cooling ↓**	Emerging amendment **AM 214 flagged**

Next best action
Brief rapporteur within 10 days

Confidence
High

Answers: what should we do next?

Dashboard your progress

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Objective	Outcome Measure	Next Milestone	Leading Indicators	Status
One	Objective [€X]m protected	Q1'27 — draft proposal within defended range	[X] priority MSs on record · [X] MEPs signed onto 'status quo' line	
Two	Objective [€X]m protected	Q1'27 — draft proposal contains differentiated options	[X] decision-makers acknowledge differentiation · [X] non-industry voices	
Three	Objective [X of Y] markets	Q1'27 — draft definitions broad enough	[X] MSs back definitional ask · zero derogations tabled	

07

Measuring value and continuously adapting

Prove the value. Learn the lessons. Plan for 2028 before the year is out.

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Report value, not activity

The executive scorecard translates the year into three numbers the CFO already tracks.

€180m

Revenue protected

Single-serve portfolio kept viable under PPWR.

€24m

Compliance cost avoided

A phased trajectory instead of an overnight switch.

−30%

Regulatory risk exposure

Proactive engagement over reactive defence.

This year's lessons are next year's plan

Planning is a loop, not a line. Start 2028 while 2027's evidence is still warm.

Plan
Choose battles

→

Execute
Sequence tactics

→

Measure
Prove value

→

Learn
Feed 2028

↺

ADVOCACY Strategy

Northwind, end to end

Premium single-serve growth → PPWR reuse rules → Top priority → Exemption objective → Focus + no-list → 4 tactics → Live dashboard

THE OUTCOME

A phased reuse trajectory and a recyclate-based exemption secured in the implementing acts — **€180m of revenue protected,** and a mandate renewed for 2028.

2027 Public Affairs & Communications

Financial Contribution

Size of Team
How we work

Projects

Trade Associations

Learning & Development

Biggest Win

Influence

Relationships

What Next

2027

2027

2028

Public Affairs 2027

Overall Status

Overall Progress

Priorities (Q1 2027)

Name	Description
Priority 1	TBC
Priority 2	TBC
Priority 3	TBC
Priority 4	TBC
Priority 5	TBC

Political Timeline

Publication
Jan 2027

Parliament
Spring 2027

Upper House
Autumn 2027

01 Consultation
March 2027

02

03 Open Hearing
Autumn 2027

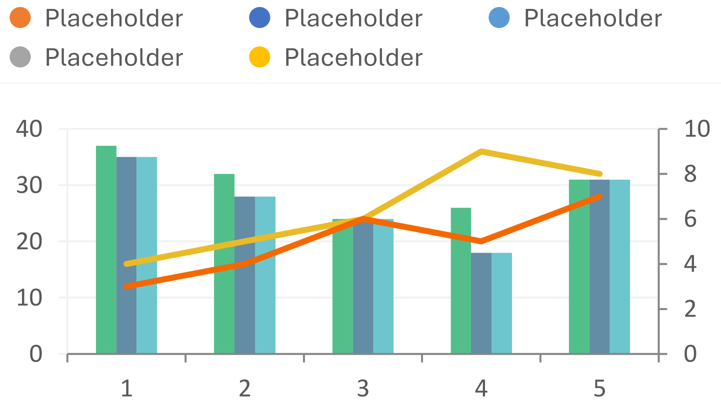
04

05 Final Negotiations
Dec 2027

Strategies

Rank	Issue
#1	Insert your text here.
#2	Insert your text here.
# 3	Insert your text here.
# 4	Insert your text here.
# 5	Insert your text here.

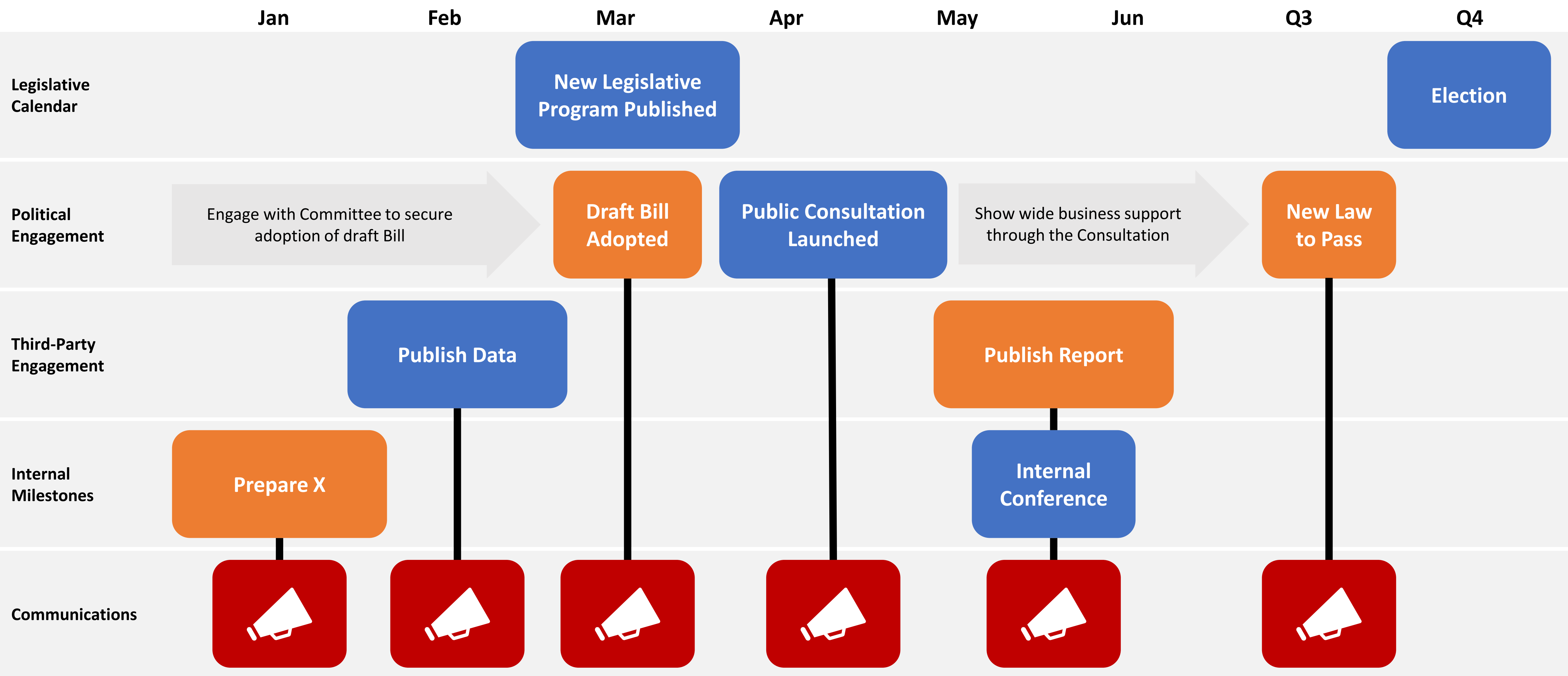
Risk Management



Risks

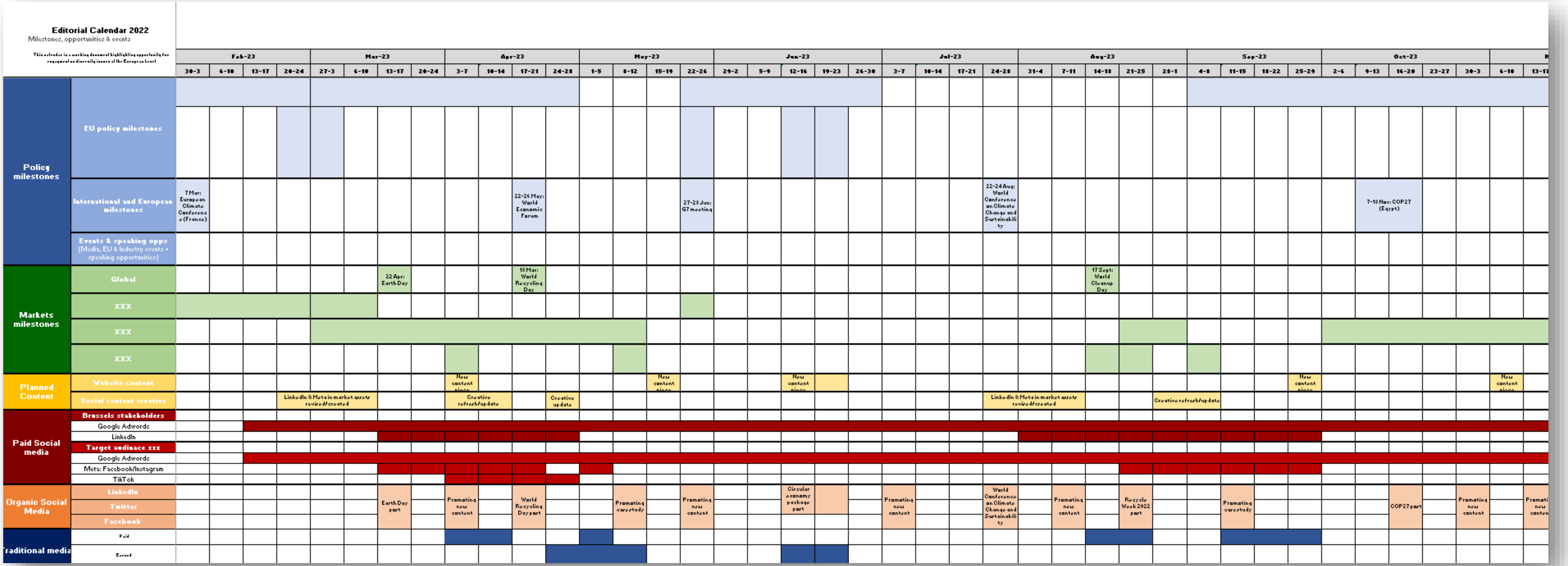
Risk Name	Impact	Probability
Risk 1	Low	Medium
Risk 2	Medium	High
Risk 3	High	Low
Risk 4	Low	Medium
Risk 5	Medium	High

2027 Milestones



Identify Outreach Tactics

How do I do it?



Public Affairs 2027

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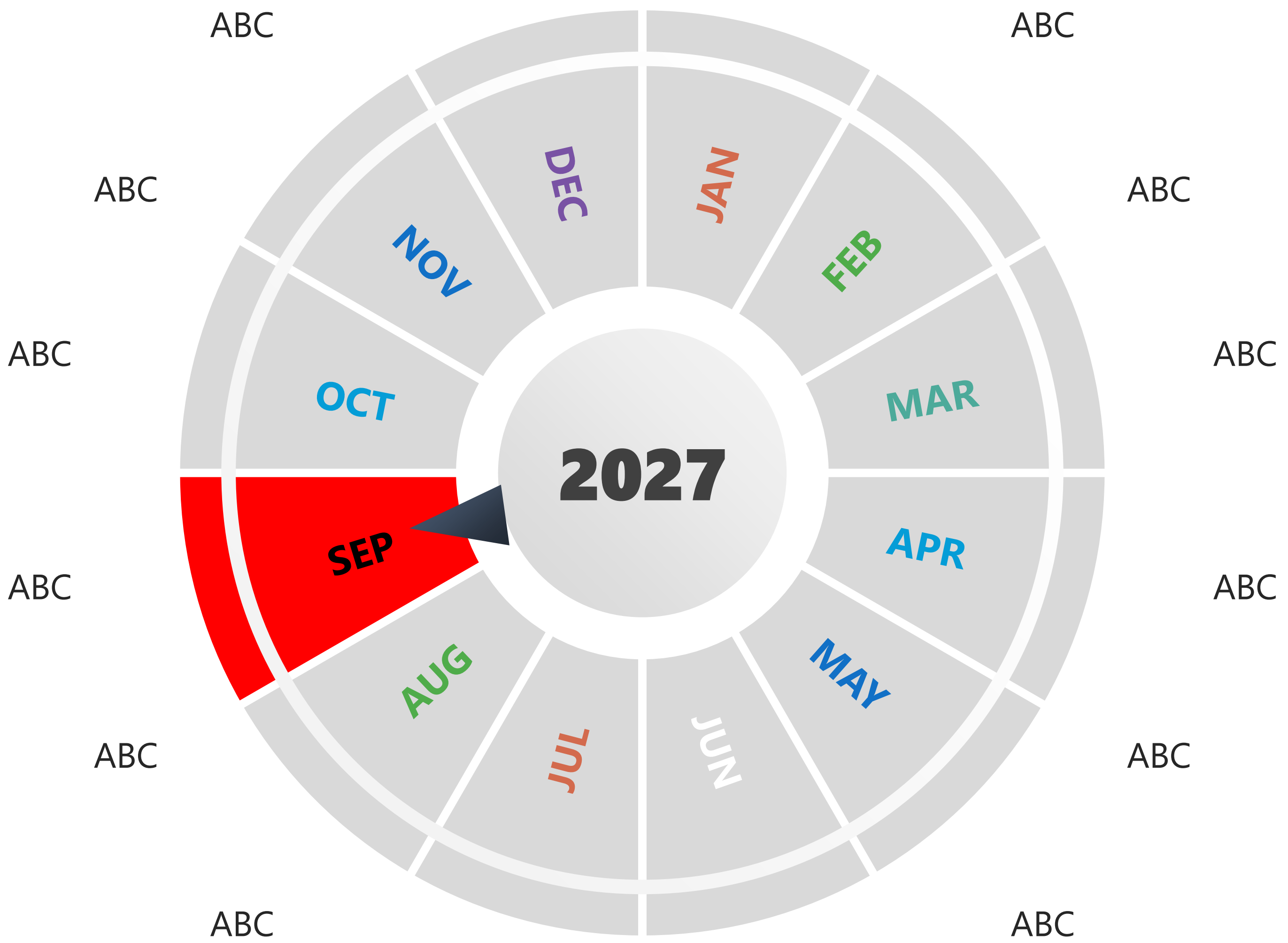

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