

2014 Public Relations - Six Step Plan of Work



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Vice:		

Committee Members:

Lindsay Ardis	Chris Davis	Kevin O’Laughlin	Grant Meyer
Eric Rogness	Nate Wenner		
Chris Duffy, PR Firm			

FOSTERING TRUST

We will foster trust by...

- Communicating the value of the Financial Planning Association to both the general public, the financial planning community and the FPA membership
- Building significant relationships with Twin Cities media outlets
- Offering support, ideas, assistance for members on how to use the FPA for their own practice development
- Creating and using a ‘tip sheet’ for other FPA committees to explain how they can help us ‘help them’ in their own committee public relations efforts

CREATING VISION

Our vision is to...

- Be the trusted source for financial planning resources in Minnesota
- Create public awareness of the importance of the financial planning profession
- Foster the image of FPA MN members as ethical and client-centric advisors
- Assist FPA MN members in communicating the value of being a FPA member to their clients and prospects

13 for 13 - Goals for Upcoming Year

1. Accountability - Track responses to Media Response Team email blast from National and local media, Facebook Advertising, Google Alerts, or Requests for interview from media
2. Assist in the consistent updating of the FPA of Minnesota website
3. Utilize social media to promote meeting speakers and highlight FPA events
4. Use “Hootsuite” to keep the FPA Twitter, FaceBook and LinkedIn to brand the CFP designation and promote FPA as the authority on financial planning
5. Develop a social media campaign to strategically communicate our messages
6. Update the media list as needed
7. Provide quarterly ‘media pitches’ to our media list of financially focused journalists
8. Provide communications to all FPA MN members on the quarterly media webinar and live training opportunities
9. Using the FPA calendar of events, be proactive in creating awareness by publicizing key events
10. Anticipate media story ideas and reach out to reporters on trends and breaking news stories
11. Continue to communicate the Consumer Oriented Articles from FPA National
12. Pursue earned media opportunities through new media relationships and partner organizations
13. Communicate to the board and membership at large tips on how the PR committee can best help them with their own PR efforts

DEVELOPING STRATEGY

Strategy	Target Date	Committee Member(s) Spearheading	Critical Success Factors
Continue communicating with other committees	Continuous, monthly	Kristy Gusick	Visit other committee meetings to learn how the PR team can best serve them
Develop new tools and improve existing tools	Continuous, monthly	Grant Meyer, Kristy Gusick	Utilize YouTube to promote meeting speakers and highlight FPA events
		Grant Meyer	Use Twitter and LinkedIn to brand the CFP designation and promote FPA as the authority on financial planning
		Committee	Develop a social media campaign to strategically communicate our message
		Kristy Gusick, Chris Duffy, Bonnie Stanley, Mike Miller, Mike Westling	Assist in the consistent updating of the FPA of Minnesota website
			Update the media list
		Kristy Gusick	Provide media training; coordinate with national office as appropriate
		John Comer, PR Committee	Keep the FaceBook page updated along with a Career Day page
		John Comer, PR Committee	Assist in development of a new FaceBook page for Financial Planning Day promotion
Pursue earned media opportunities	Continuous, monthly	Various Committee Members	Using the FPA calendar of events, be proactive in creating awareness by publicizing key events
		Various Committee Members	Anticipate media story ideas and reach out to reporters on trends and breaking news stories
		Grant Meyer	Continue to tweet the press releases from FPA national
		Chris Duffy	Send out quarterly updates with media pitch ideas to financially-focused journalists
Other	Continuous, monthly	Chris Duffy, Kristy Gusick	Cross-pollinate with other financial organizations to grow membership and create public awareness
			Collaborate with AARP on public events

ENERGIZING ALLIANCES

Alliance	What do we want?	What do they want?
Local Media	To strengthen relationship	Hot topics and trends as it relates to the local market
All FPA Committees	Help in fostering relationships	Providing exposure to the media
Business organizations e.g. AARP	Relationship and exposure	Financial education for their members

ACTIVATING TRANSFORMATIONS

- Promote FPA MN members' success to the public on a regular basis
- Seek more public speaking opportunities to promote FPA MN
- Recruit new talent to serve on committee and develop succession plan

MEASURING PROGRESS, ACHIEVING RESULTS AND RESETTING THE VISION

Strategy	Monthly Report of Achieved Progress	Current Action Item(s)	Person Responsible (Alliances?)	Deadline for Action

RESETTING THE VISION

We will review monthly and reset the vision this fall prior to the Strategic Planning meeting for next year.