Promoting the Profession

Tips on communications & PR from
The Institute of Internal Auditors

Trish W. Harris
Director, Corporate Communications
Global Headquarters
247 Maitland Avenue
Altamonte Springs, FL 32701 USA

Tel: +1-407-937-1245
Fax: +1-407-937-1101
E-mail: pr@theiia.org
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Saddle Up!

“One of the biggest reasons for organizational failure is riding the metaphorical horse until it drops, rather than shifting horses.”

–Anonymous

What does changing horses have to do with internal auditing? More than you might think . . .

Understanding the need for change, adapting to change, and even embracing change are all hallmarks of success. And today’s successful internal audit practitioners must be veritable change-masters. Virtually every aspect of the profession has changed radically. Contemporary internal auditing has evolved into a process that only vaguely resembles the narrowly focused, financially oriented practice it once was.

Never before has it been more important that internal auditors build a universal understanding of our expanded profession. As such, promoting the profession has taken on a vitally important role at The IIA, and communications and PR components are woven throughout the fabric of The Institute’s goals and objectives and advocacy initiatives.

The materials presented within this notebook are designed to provide step-by-step guidance for promoting your chapter or affiliate and the profession. This kit is chock-full of definitions, explanations, examples, and how-to instructions that will guide your communications chairman in implementing an effective communications program. (You DO have a communications chairman, don’t you?)

And if your chapter has never before included PR in your long-range plans, NOW is the time to saddle up and take this horse by the reins!

Public relations (PR) is the management function that identifies, establishes, and maintains mutually beneficial relationships between an organization and its various publics/targets. PR helps an organization and its publics adapt to each other. PR’s primary goal is to influence its target markets.

Public relations helps make the organization responsive to others by monitoring their needs and interests, interpreting those needs in light of organizational decisions and actions, and providing feedback and counsel to management. PR serves society by mediating conflict and by building relationships essential to the dynamic consensus upon which social order is based.
What PR Can Do
Public relations helps our complex, pluralistic society to reach decisions and function more effectively by contributing to mutual understanding among groups and institutions. It serves to bring private and public policies into harmony.

Public relations serves a wide variety of institutions in society such as businesses, trade unions, government agencies, voluntary associations, foundations, hospitals, schools, colleges, and religious institutions. To achieve their goals, these institutions must develop effective relationships with many different audiences or publics such as employees, members, customers, local communities, shareholders, other institutions, and society at large.

As a management function, public relations is remarkably similar to internal auditing! And when used to promote internal auditing, PR creates a win-win situation for the profession and The IIA.

Public relations includes:

- Anticipating, analyzing and interpreting public opinion, attitudes, and issues that might impact, for good or ill, the operations and plans of the organization.

- Counseling management at all levels in the organization with regard to policy decisions, courses of action, and communications, taking into account their public ramifications and the organization’s social or citizenship responsibilities.

- Researching, conducting, and evaluating, on a continuing basis, programs of action and communication to achieve the informed public understanding necessary to success of an organization’s aims. These may include marketing, financial, fund-raising, employee, community- or government-relations, and others.

- Planning and implementing the organization’s efforts to influence or change public policy.

PR Elements:

- Counseling – Providing advice to the management of an organization concerning policies, relationships and communications; in effect, “what to do.”
• Research – Determining attitudes and behaviors of publics and their causes in order to plan, implement and measure activities to influence or change the attitudes and behavior.

• Media Relations – Relating with communications media in seeking publicity or responding to their interest in an organization.

• Publicity – Disseminating planned messages through selected media without payment to further an organization's interest.

• Employee/Member Relations – Responding to concerns and informing and motivating an organization's employees or members, its retirees and their families.

• Community Relations – Continuing, planned, and active participation with and within a community to maintain and enhance its environment to the benefit of both an organization and the community.

• Public Affairs – Developing effective involvement in public policy, and helping an organization adapt to public expectations; also a term used by military services and some government agencies to describe their public relations activities.

• Government Affairs – Relating directly with legislatures and regulatory agencies on behalf of an organization, usually as a central element of a public affairs program; often called “lobbying.”

• Issues Management – Identifying and addressing issues of public concern in which an organization is, or should be, concerned.

• Financial Relations – Creating and maintaining investor confidence and building positive relationships with the financial community; also, sometimes known as Investor Relations or Shareholder Relations.

• Industry Relations – Relating with other firms in an organization's industry and with trade associations.
• Development/Fund Raising – Demonstrating the need for and encouraging an organization’s members, friends, supporters, and others to voluntarily contribute to support it.

• Minority Relations/Multicultural Affairs – Relating with individuals and groups in minorities.

• Special Events and Public Participation – Stimulating an interest in a person, product, or organization by means of a focused “happening;” also, activities designed to enable an organization to listen to and interact with publics.

• Marketing Communications – Combination of activities designed to sell a product, service, or idea, including advertising, collateral materials, publicity, promotion, packaging, point-of-sale display, trade shows, and special events.

Which of these are appropriate when promoting your chapter activities to your members?

Which would work well with senior management, boards, and audit committees?

How about other markets you’d like to reach?
Target Markets

Who Are The Customers?

Consider the list below, brainstorm new ideas, and develop your own list of markets you might target to promote understanding and full utilization of the profession.

- Existing IIA members
- Potential IIA members
- Sister associations
- Senior management
- Boards of directors
- Audit committee members
- Government
- Regulators and legislators
- Business community
- Other stakeholders

NOTE: As you attempt to reach your existing and potential customers, use e-mail judiciously! At IIA headquarters, the e-mail policy ensures that e-mail is used for only those who have specifically requested it or granted their express permission to be contacted electronically.

Key Messages, Key Categories

In order to be responsive to those we serve, The IIA must always stay in touch with current thinking, trends, and topics that affect the profession. One of The Institute’s key promotional efforts is to help keep our publics informed about key messages. The growing list of key messages is available in The IIA’s online newsroom.

Another strategy is to categorize all IIA guidance, programs, products, and services by topic, throughout our Web site and in our promotional materials, newsletters, and presentations. IIA chapters can significantly further the effectiveness of this approach.

Conduct a brainstorming session with your chapter leaders and list next to each category below, one or more promotional strategies you could implement at your chapter:

- Audit Committees, Governance
- Audit Management
- Audit Tools
- Certification
- Fraud, Ethics, the Law
- Standards and Other Guidance
- Specialties (Industry, Service, Job, Sector)
- Information Technology
- Quality
- Risk, Control
- Sustainable Development or Corporate Social Responsibility
Key Messages
Global attributes of the internal audit profession include practicing in accordance with the *International Standards for the Professional Practice of Internal Auditing* (Standards) and the Code of Ethics, certification (Certified Internal Auditor), professional development, and an ongoing commitment to quality assurance and improvement.

1. **What is internal auditing?**
   
   Performed by professionals with an in-depth understanding of the business culture, systems, and processes, the internal audit activity provides assurance that internal controls in place are adequate to mitigate the risks, governance processes are effective and efficient, and organizational goals and objectives are met.

2. **Why should an organization have internal auditing?**
   
   A cornerstone of strong governance, internal auditing bridges the gap between management and the board, assesses the ethical climate and the effectiveness and efficiency of operations, and serves as an organization’s safety net for compliance with rules, regulations, and overall best business practices.

3. **What should be the reporting lines for the chief audit executive (CAE)?**
   
   To ensure transparency and thwart collusion and conflicts of interests, best practice indicates that the internal audit activity should have a dual reporting relationship. The CAE should report to executive management for assistance in establishing direction, support, and administrative interface; and to the organization’s most senior oversight group — typically the audit committee — for strategic direction, reinforcement, and accountability.

4. **What is the appropriate relationship between the internal audit activity and the audit committee?**
   
   The audit committee of the board of directors and the internal auditors are interdependent and should be mutually accessible, with the internal auditors providing objective opinions, information, support, and education to the audit committee; and the audit committee providing validation and oversight to the internal auditors.
5. **What services can the internal auditors provide for the audit committee?**

The internal auditors provide to the audit committee objective assessment on the state of the organization's risk, control, governance, and monitoring activities.

6. **How does internal auditing maintain its independence and objectivity?**

**INDEPENDENCE:** The audit charter should establish independence of the internal audit activity by the dual reporting relationship to management and the organization’s most senior oversight group. Specifically, the CAE should report to executive management for assistance in establishing direction, support, and administrative interface; and typically to the audit committee for strategic direction, reinforcement, and accountability. The internal auditors should have access to records and personnel as necessary, and be allowed to employ appropriate probing techniques without impediment.

**OBJECTIVITY:** To maintain objectivity, internal auditors should have no personal or professional involvement with or allegiance to the area being audited; and should maintain an un-biased and impartial mindset in regard to all engagements.

7. **Why should an organization have an audit committee?**

The audit committee, or other appropriate independent oversight subset of the board of directors — the key oversight group of the internal auditors — is critical to ensuring the organization has strong and effective processes relating to independence, internal control, risk management, compliance, ethics, and financial disclosures.

8. **How do internal and external auditors differ and how should they relate?**

Although they are independent of the activities they audit, internal auditors are integral to the organization and provide ongoing monitoring and assessment of all activities. By contrast, external auditors are independent of the organization, and provide an annual opinion on the financial statements. The work of the internal and external auditors should be coordinated for optimal effectiveness and efficiency.
9. How should an internal audit activity be staffed and what skills are needed?

A broad range of skills and expertise, and ongoing professional development are critical to the formation and maintenance of an effective internal audit activity. Essential elements include in-depth knowledge of the organization’s industry and internal audit Standards and best practices; technical understanding and expertise; knowledge on, and skills for implementing and improving processes in both financial and operational areas; and strong communication and presentation skills.

Although some co-sourcing and outsourcing might be necessary when unique competencies and specialty skills are not affordable or available, the internal audit activity should be managed from within the organization.

10. What is Enterprise Risk Management (ERM) and what role does internal auditing play in ERM?

Enterprise risk management is a structured and coordinated entity-wide governance approach to identify, quantify, respond to, and monitor the consequences of potential events. Implemented by management, ERM is evaluated by the internal auditors for effectiveness and efficiency.

11. How does internal auditing go about prioritizing its resources?

Effective prioritization involves staying in sync with the organization’s risk priorities and taking a risk-based approach to internal audit planning. By continuously monitoring organizational changes that might alter the plan, the CAE should be well equipped and positioned to make informed and educated recommendations to management and the board on the most effective use of internal audit resources.

12. What standards guide the work of internal audit professionals?

As part of The IIA’s Professional Practices Framework, the International Standards for the Professional Practice of Internal Auditing (Standards) outline the tenets of the internal audit profession. Other applicable guidance, pronouncements, and regulations also may have an impact on how internal auditing is performed; and may provide clarification and delineation of acceptable and recommended processes.
A Strategic Direction

“The key word is flexibility, the ability to adapt constantly. Darwin said it clearly. People thought that he mainly talked about the survival of the fittest. What he said was that the species that survive are usually not the smartest or the strongest, but the ones most responsive to change. So being attentive to customers and potential partners is my best advice – after, of course, perseverance and patience.”

-Philippe Kahn
Founder, Borland International

Positioning and promotional strategies must change as dictated by our changing profession and its changing markets. Key strategies should be actionable and measurable and should work to differentiate the organization and its products from the competition. A good strategy is one that keeps what you have and gets what you don’t have.

In order to ensure that a strong, effective, and up-to-date communications strategy is in place, it is important to garner organization-wide buy-in on the key objectives. As the profession’s recognized authority, acknowledged leader, and primary educator, The IIA is dedicated to speaking in support of — and advocating for — internal auditing and professional internal audit practitioners. This also is key to the successful efforts of chapters and affiliates.

As you plan your strategy for promoting the profession, use this list as a starting point to get your thinking on track.

- Determine just how much (or little) those outside of the profession truly know about internal auditing. Refer to the accompanying questionnaire, “Do People Know What You Do?”
- Identify the perception that you want your publics and target markets to have of your chapter and of the profession.
- Identify the challenges you might expect along the way, and design strategies for confronting each potential obstacle.
- Determine the key messages you wish to convey.
- Describe how publicity and promotions will convey the unique characteristics of internal auditing and its intrinsic value.
- Identify the distribution channels through which information will be made available to the target market/end users.
- Determine where you might need help and brainstorm how you might obtain it.
Do People Know What You Do?
When I am introduced at parties or other social gatherings and people learn that I am an internal auditor, ___ percent of them understand what I really do. (For example, 100 percent will know what a barber does, but only three percent would know that an oncologist studies tumors.)

At a meeting of business people, generally about ___ percent of the people who hear my name and a very brief description of what I do will know a lot about it.

How much do my organization’s shareholders (_________), management (_________), board (_________), and audit committee (_________), really know about what I do? (nothing, a little, a lot)

Are there experts in my field and related fields who have had little or no experience with my IIA chapter or affiliate?  Yes   No
List by category.

What specific categories of people who have less than an average level of knowledge about internal auditing or my affiliate might benefit from knowing more?

How might I go about educating them about the profession and my chapter?

What information on the profession, The IIA, and my chapter is available to me?
International Internal Audit Awareness Month

May of each year is the designated month throughout the world to build awareness of the internal audit profession and its important role in organizational governance, internal control, and risk management. The IIA encourages chapters and affiliates around the world to participate in this important celebration to promote the profession internally to audit customers, executive management, and the board, as well as to various outside target markets within their local business community.

Chapters and affiliates can use this month to showcase the value of the internal audit activity in a wide variety of ways including, but not limited to: hosting special events, such as luncheons or receptions to present local area business leaders with an overview of the ways internal auditors support executive management in achieving organizational goals and objectives; submitting a request for a proclamation from a local government official, formally acknowledging Internal Audit Awareness month; or participating in a local college or university career night to promote internal auditing to students who may be unaware of the various avenues available within the profession.

Regardless of how chapters and affiliates choose to share the purpose and value of internal auditing with their community, the most important lesson to take away is that building awareness takes time and consistent effort. Holding one event, obtaining one proclamation, or issuing one newsletter is one more step forward in the process - a step in the right direction.

For additional suggestions, please visit http://www.theiia.org/theiia/about-the-profession/promoting-the-profession/
International Mastering Advocacy Program

Contrary to some rather "black and white" functions with clearly delineated areas of influence, internal auditing is a broad-based process that affects virtually every aspect of the organization in various shades of gray. And yet, it often is underutilized, and occasionally is misunderstood, or even ignored.

The IIA is committed to changing that! We are working diligently to ensure that management, the board of directors, the audit committee, and other stakeholders recognize internal auditing's vast potential for utilization, understand the value it adds, and acknowledge its role, contribution, and importance to the success of the organization as a whole. The Institute's commitment is so deep that it has an entire division devoted to advocacy for the profession. And a large component of advocacy is using effective communications, special events, and proactive public relations to promote the profession.

In an effort to applaud our chapters and affiliates who are engaged in public relations campaigns to promote the profession around the world, we have designed the prestigious International Mastering Advocacy Program (IMAP) Award. By increasing media exposure and visibility on internal audit issues, identifying the profession as an ideal career choice, and publicizing the value internal audit processes bring to shareholders, many IIA chapters and affiliates have contributed significantly to this important global initiative.

The Institute has clearly outlined the task: to advocate for the profession and The IIA; to foster awareness of internal auditing as a key function in risk management, control, and governance; and to position The IIA as the premiere authority for information and leading-edge knowledge of the profession. The IMAP Award visibly personifies the process!

The winning IMAP entry is announced and displayed at The IIA's International Conference, and recognized in IIA publications, as well as on the Website. The winning chapter or affiliate receives a stunning trophy and a special on-site training. All IMAP participants receive a certificate in recognition of their efforts and commitment to promoting the profession.

Please join us in this global effort to elevate the profession, and to educate all those involved in management, governance, risk, and control about internal auditing’s vital and valuable roles.
Plan Ahead for PR and Keep It Simple

• A simple phone call or news release can often go a long way to getting your event publicized. Contact the business editor/reporter of your local newspapers, community magazines, and radio and television stations. Introduce yourself in advance of your event to build relationships with these individuals.

• A news release is a concise but complete description of an upcoming news event; notification of important personnel or procedural changes in an organization; or other news or feature tips.

• Identify your chapter as the sender and include the name and daytime phone number (with area code) of a contact person who can answer questions. Date the release and tell whether the information is for immediate use or release at a later date. Include a “topic” line at the top of the release, which describes the subject.

• Your news releases should be accurate and contain the most important information: who, what, when, where, why, and how – in the first paragraphs. The paragraphs that follow should provide more details, in descending order of importance.

• News releases should be short, clearly written, and typed double-spaced. If a release is longer than one page, type “more” at the center of the bottom of the first page. Identify following pages with either the subject of the release or the name of your organization at the top. Type “end,” “30,” or “###” at the bottom of the last page.

Identify What’s New(s)
Here are some suggested news release subjects:

• Interesting speakers
• Hot topics or issues
• New Certified Internal Auditors® (CIAs®)
• Chapter’s anniversary
• Seminar/conference/workshop
• New officers
• Special awards
Avoid Common Mistakes
- Providing insufficient and inaccurate information. To be useful, releases must be complete, correct, and specific.
- Omitting the name and daytime phone number of someone reporters can contact with questions. This information should be prominently displayed at the top of your release.
- Writing releases that are too long; they should be as short as possible and double-spaced for readability.
- Submitting a release too late. As the adage goes, “old news is no news.”

Remember the Basics
- The media depend on information.
- Make sure your story is newsworthy.
- Put the most important elements in the first paragraph of a news release.
- Give the media ample notice of forthcoming events.
- Keep your mailing list current.
- Be familiar with the types of articles/news covered in all media targeted.
- Proofread your release.
- Have someone else proofread your release.
- Proofread your release AGAIN!

News Release Checklist

CONTENT
- Always have a reason to write a news release.
- Use content that meets the standard for print or broadcast media.
- Include facts that answer these questions:
  - Who?
  - What?
  - Why?
  - When?
  - Where?

STYLE
- Begin with a short sentence that tells the essence of the story (editors often decide after reading one sentence).
- Keep sentences short.
- Keep paragraphs short.
- Keep news releases to one or two pages.

FORMAT
- Head the news release with a short statement saying what the release is about.
- Provide the name and number of a person to contact about information in the release.
- Say who the release is from, and when it was released.
- Double space copy.
TOOLS & TIPS

DISTRIBUTION

• Time your releases in consideration of media deadlines.
• Use fax, mail, or, with permission of recipients, e-mail.
• Target releases to individuals, when possible.
• Verify media lists before distribution.

Name Your “Speaker of the House”

Appoint a chapter contact for the media. This individual should be someone who feels comfortable being interviewed, and who is well-informed and articulate. Your appointee will not only represent your chapter or national institute, but the entire IIA itself. Your media contact should present a professional image and be a quick thinker who can readily formulate appropriate responses. And when in doubt, “I am not sure, but I’ll find out and get back to you with an answer,” is appropriate.

Should your local media wish to speak with The IIA’s global chairman of the board or president, please contact The IIA’s Corporate Communications department at pr@theiia.org.

Tips for Setting up a Speakers Bureau

• Find the experts. Promote articulate and experienced practitioners, conference speakers, seminar leaders, and workshop facilitators.
• Create a fact sheet with suggested topics for presentation. Using the categories listed in the IIA OFFERINGS section, develop topics with the most potential for reaching your target markets.
• Develop short (approximately 100 words) introductions for your speakers.
• Research community clubs and other organizations who might welcome a presentation on the profession. (You might be able to secure PR help from marketing student at a local college or university! To inquire, contact the institution’s department of marketing.)
• Develop a speakers bureau kit, including a cover letter pitching your speaker(s), along with the topics fact sheet, speaker bios/introductions, information on The IIA and/or your affiliate, and your Web site and www.theiia.org.
• Write cover letters to community groups, pitching your speaker(s), topics, and the profession.
Your PR Toolkit

Now you’ve learned about many ways you can use PR to help internal auditing maintain its rightful status as a credible and valuable cornerstone of effective corporate governance. This toolkit is fully equipped with tools for promoting the profession. And as you pick and choose from your kit, keep in mind your top priority: promoting to your own members!

Your Membership Directory, newsletters, brochures, announcements and other information from headquarters; and chapter, affiliate, and global IIA Web sites also are valuable tools for informing your membership about the profession, activities, programs, and services.

When you combine IIA-generated materials with your own announcements of activities, new CIAs, special events, and other local information, you have everything you need to communicate with your members and your many other target markets.
Tell the World!
Publicity can provide valuable exposure and recognition for the profession in general and for your chapter, specifically. It can also help promote the efforts and offerings of The IIA.

Without the sharing of knowledge and information on the profession and your chapter, there can be NO progress. What you choose to share and how you organize that information can mean the difference between success and failure. First, decide what your target needs to know. And second, devise an appealing way to provide that information.

To promote a speaker or a hot topic you can customize a kit by including a resume, a photo, and a phone number for the speaker. Provide the media with press passes to any conferences and seminars. The meeting or conference expenses you absorb are well worth the exposure.

At IIA headquarters, we have a comprehensive media kit that covers all aspects of The Institute and the profession. It is available online in The IIA Newsroom. Use this as a guide for development of your own kit, including:

- Affiliate history and composition
- Definitions and explanations
- News releases
- Key messages
- Calendar of affiliate meetings and local, regional, and global events for the year
- Officer listing
- Contact information

Keep Contacts Current
Make sure you send information to the appropriate individual. This is very important in the general business media where changes in personnel occur often. News releases and story ideas have a better chance of receiving attention if they are directed to the proper editor, reporter, or news director. Find out which reporter covers association news, business controls, governance, etc., and what he or she looks for in a story. The newspaper, magazine, television, or radio station operator will usually give you the names of people to contact if you don’t know them already.

Plan Ahead
Be sure to inquire as to advance time needed to post an announcement, article, or story and be sure to meet the deadline. The timing of your publicity depends on the timeliness of your story/announcement. A quick-breaking news development can be relayed immediately by telephone.

In general, if you are planning a meeting or event, follow these timelines when mailing, faxing, or e-mailing news releases:

- Newspapers: Mail information two weeks in advance.
- Magazines: Mail information two to three months in advance.
- Television: Mail four to five weeks in advance.
- Radio: Mail information two to three weeks in advance.
Never call a reporter after 4:00 p.m. In general, call daily reporters in the morning (between 9:30 and 10:45 a.m.) and weekly reporters the day after their editorial deadline. Before delivering a long-winded pitch of your story idea, always ask if the reporter is on a deadline.

**Do Your Homework**

- Although radio DJs don’t often banter on air about the good or bad taste our profession leaves in their mouths, opportunities for exposure can pop up anywhere at any time. Be prepared and seize the day when it dawns! Once you identify an upcoming story in which you hope to be included, you should evaluate its value and understand certain vital details:

  - What is the audience, circulation, ad rate, and mission of the publication? With this info, you can decide whether it’s a publication that reaches your market, the likely appeal of your message, and the value and reach of coverage in that publication. Pick only those publications that will have highest impact for your marketing objectives.

  - Which reporter, editor, or freelancer is writing the story? What are this person’s beats, areas of interest, background, and work style? This knowledge tells you whom to call and talk to about the story, and how to work with him or her.

  - What is the date of the issue you’re targeting? Knowing when coverage will appear in print lets you decide whether that timing is appropriate for you.

  - What is the lead time for this story? This is critical. It tells you when reporters will begin their work on the story, and, therefore, when you want to initiate contact so you can be included in this specific story.

  - What type of story is it going to be? The specific story angle chosen by the editor or reporter can be highly varied, and will directly influence both your chances for coverage and the kind of information you should provide to the reporter. Sometimes publications run round-up stories that briefly cover all possible related companies, while other times they may seek just a few examples to illustrate their point in depth, or simply publish a listing of the products or companies in a given category with very little in the way of editorial.

  - What information does this reporter or editor need? Given the type of story and topic, what are the practical information needs of the journalist? Getting reporters and editors what they want, when they need it, and in the form in which it’s easiest for them to use (fax, e-mail, photos, press releases, a table, etc.) is a key starting point in successful contact.
o One way to be prepared is to be familiar with all available resources. For example, there are many fine online resources and references for public relations and promotion. Spend some time searching the Web and bookmark the sites that you find to be most informative and helpful. A couple to start with are www.toolkit.cch.com and www.prsa.org. And don’t forget to refer often to The IIA’s Web site at www.theiia.org

Use Editorial Calendars
An editorial calendar is a publication’s schedule of upcoming article topics and special-issue focuses. Editorial calendars are in a sense misnamed: they are often created by the magazine’s publisher as a vehicle for selling advertising (a special “gifts” issue, for example, helps the magazine sell advertising for gifts). Yet in each case, the editorial staff creates an article, or a set of related articles, that focus on the topic or topics of that issue.

This relative certainty of upcoming coverage is the key: Instead of having to persuade a skeptical reporter to cover your market, you know he or she is working on a particular story. You can then fit your message into that story topic, which makes your input a welcome addition to what the reporter is at that moment working on. Instead of being in an adversarial posture with a reporter, you are in fact helping a very busy person do his or her job.

Nearly every magazine and hundreds of newspapers publish editorial calendars. You can get a free copy from the magazine’s ad sales or publisher’s office, along with a media kit and a sample issue. Start with the obvious publications that you know are most read and most trusted by your customers and prospects. You can then review each upcoming issue of each target publication and pick out those stories in which you’d most like to be included.

Unfortunately, finding and reviewing editorial calendar opportunities isn’t a job you do once for the year. In today’s world of rapid change, the media must change their coverage plans to keep pace. Editorial calendars, topics and schedules are therefore frequently revised. You must monitor the calendars of publications carefully, or you may have the unpleasant experience of reading about your competitors in a story you never saw coming.
Making Your Pitch: Step-by-Step

Every story opportunity you identify represents an opportunity for high-impact coverage – and a challenge! To be successful, you need to go after every story carefully and intelligently.

Step 1: Prepare Your Materials

Your public relations capability should include the basic PR materials a journalist will expect – these typically include a one- to two-page company profile or “backgrounder,” a one-page fact sheet on each of your products or services, perhaps one or more relevant recent press releases, and clear sources for additional information. These materials should be assembled in a press kit folder for more polished presentation.

Step 2: Tailor Your Stories

Be empathetic when you suggest your story angle. Remember that journalists must serve their specific audience with real value, seek originality in content and coverage, are probably overworked, and may or may not be an authority on the subject at hand. Determine the publication’s audience and editorial style, ideally by reviewing the publication itself. Imagine the headline or presentation of the story you have in mind. Finally, outline your proposed story angle on paper to identify one to three key points that will be compelling and informative for readers and, therefore, to the reporter.

Step 3: Suggest Creative Sidebars & Graphics

Remember that publications run many types of stories, and you might make a suggestion that shapes the entire story in a way that will greatly benefit your cause. For example, often a main story will run with companion sidebars on closely related subjects, such as a short vignette on an example that illustrates the general theme of the major story. Such a sidebar is often more eye-catching than the sometimes-dense main story, and can be a better place to have your message appear. Similarly, don’t limit your thinking to words; remember to consider visual presentation. One of the greatest challenges faced by journalists in print media can be coming up with graphics, photos, charts, or other illustrations of the story theme that are compatible with the publication’s style. By suggesting such nonverbal, visual presentation, or, even better, directly providing compelling visuals yourself, you can shape the entire story even as you provide a highly valuable form of support to the journalist. Before you call, think of potential sidebar themes, visual suggestions, or other creative ideas you can make as part of your presentation.
Step 4: Contact the Editor

Call the publication and confirm the name of the reporter or editor responsible for the story with a managing editor or someone else in “editorial,” that is, the part of the magazine staff that prepares article content (versus the ad sales, production, or other parts of the staff).

Ask to speak with the reporter covering the story, and jump right in! Your success need not be mysterious – it’s actually very basic. Be helpful, positive, knowledgeable, and assertive. You might start by identifying yourself and saying something like: “Hi, I understand that you’re starting work on a story about <…> I’ve got something I thought might fit into the story really well, and wanted to give you a call to see if you might be interested...” (If you get voice mail, either call back later or, if necessary, leave a high-impact 20-second message. Then don't forget to call back later.)

Your call can then go in any of several directions. You can ask if the reporter and editor have decided on an approach for the story, what specific angles they’re considering or working on, the format, potential side bars, graphic presentation, length, etc. If the reporter is willing to chat and convey this background, by all means listen! It simply gives you more insight into how to present your ideas before your presentation.

When it’s time for you to talk, be ready with your shortest, most compelling possible presentation of the key points of your idea. This is a sales job, and the journalist is your customer. You are likely to succeed or fail in the first 30 seconds of your presentation. If you've done your job above, your presentation will be strong: tailored to the audience, relevant to the scheduled editorial calendar theme, creative in format or visuals suggested, easy for the reporter to understand and act upon, and helpful and valuable to the reader.

Have a good message, do your job, and you'll meet your coverage goals!

Step 5: Remember Your Manners

Media relations is a very human, very information-intensive job. Etiquette counts, which amounts to simple courtesy, integrity and interpersonal respect. Remember that an angry editor is not likely to do you any favors! The rules of media relations behavior flow from those premises.

- Respect their time: Reporters are very busy, and especially in your initial contact with them, be extremely efficient in presenting your ideas or suggestions.
• “No” means “No.” Contrary to the hopes of some people, square pegs don’t fit into round holes. Don’t keep desperately pitching a story that the reporter is firmly convinced does not fit. It won’t work. It’s usually far better to move on to another opportunity, or listen carefully and come back in a few days with a better angle that responds to the problems the reporter had with your first idea.

• Tell the truth: Few things are more short-sighted than misrepresenting a story to a reporter. You will have burned someone who trusted you, and what does it get you? Even if you’re successful in getting the misinformation printed, the reader (your prospect) will be misled and will be an unhappy customer.

• Editorial calendars can be one of the most powerful publicity tools at your disposal. By tailoring your message to the editor’s theme, you can soon have your competitors asking, “Why can’t we get into an article like that?”

Media Encounter Tip Sheet
1. Be prepared.
   • Set your objective and three to four key points to make.

2. Take and keep control.
   • Decide where to be interviewed.
   • Use answers to bring questioner to your points.
   • Avoid repeating negatives.
   • Leave when you are finished.

3. Make your points.
   • Answer in quick, clear, concise statements.
   • Repeat key messages.
   • Stress the positive.

4. Keep your composure.
   • Never argue; be cooperative.
   • Avoid appearing defensive.

5. Don’t speculate.
   • It is OK to say you don’t know.

6. Never say, “No comment.”
   • Give sound reasons why you cannot answer.

7. Never go “off the record.”
   • Everything you say may be reported.
Form & Function: A Self-examination

Ensuring the successful future of your affiliate newsletter is not as difficult as you might think! In fact, with a little planning, formatting, and attention to detail, your newsletter can actually become one of the most powerful means for promoting your affiliate, The IIA, and the internal audit profession as a whole. It all begins with asking the right questions — questions about:

Strategic Business Focus
- Does the publication further your affiliate’s goals so that members feel that it is an objective vehicle?
- Does it give members the information they need to help your affiliate, The IIA, and the profession succeed?
- Does it include information on affiliate membership, events, and other activities?
- Does it cover stories about products and services, industry trends, and international initiatives?

Member Involvement
- Does the publication promote two-way, upward communication?
- Are members involved in the publication through a letters section or a question-and-answer forum?

Personality
- Does your newsletter have an editorial “voice” — represented by tools such as columns and editorials?
- Is the editor willing and able to risk using humor and other means to make the publication lively?

Writing and Design
- Is the publication reader-friendly?
- Are photos used well?
- Does the layout include plenty of white space?
- Is the copy effectively written and proofread?
Content, including:

- A message from your chapter president
- A calendar of affiliate events and regional and international happenings
- A “News from Headquarters” column featuring important information for members
- Ads on new programs, products, and services from The IIA
- A “Question & Answer” column concerning issues of interest to your members
- Information on IIA membership
- Details on chapter on-site training programs
- Quotes and testimonials from members who have benefited from active membership
- Story submissions from members featuring innovative ways of solving auditing problems, best auditing practices, and successful tactics for marketing the profession to management, the board of directors, and the audit committee
- Program and product reviews of new IIA offerings
- Affiliate surveys, reports, and contests
- Information on ways members can increase their contribution to the profession through committee involvement, speaking engagements, writing for IIA publications or certification examinations, IIA Research Foundation donations, and various other activities
- Monthly references to the information on www.theiia.org
- Contact information for chapter leaders

Follow-up information after local, regional, and international events and event speeches and session notes converted to feature articles.
Best Practices

- **Less is more** . . . In most cases, presenters do not make effective use of PowerPoint as a presentation tool.

- **Slides are not your entire message**! Instead, they should ONLY be key words or talking points.

- **Too often, presenters read their slides**. Bad idea! If reading your slides is all you bring to the podium, you are unnecessary, for your audience can read!

- **Let your passion show** through in your stories, knowledge, and enthusiasm for your topic.

- **Think: 5X5** . . . No more than five bulleted items. No more than five words per bullet.

- **Convey your message** . . . with your slide’s title on no more than seven words.

- **One idea – one slide.**

- **Eliminate sub-bullets.**

- **Minimize animation**. Make sure that any special effects or animation has a clear purpose. Otherwise, it will appear to be amateurish. Also, overdoing effects can distract from your message.

- **Ensure readability** of your slides by even the attendees in the back of the room. Use the largest point size possible.

**Always** . . . include branding in your presentations. At The IIA, we have templates that have been approved for outside use. Please use one of these when you are delivering a message on behalf of The Institute.
Philanthropy in Action

The IIA has joined forces with JA Worldwide (JA). You are invited to participate in this exciting project. JA is the world's largest and fastest-growing non-profit provider of business and economics education for youth. Currently, the organization reaches out to more than seven million students from kindergarten through high school. Its goal is to help school children understand the economics of life through hands-on experiences that expose them to the real world and open their minds to the opportunities the business community has to offer.

Through JA, IIA members have the opportunity to connect with children within their local communities and communicate the life lessons their experiences have provided them. As a professional internal auditor you can share with potential practitioners of tomorrow your passion for the profession.

By contacting the closest JA affiliate through the organization’s Web site at www.ja.org, IIA members can learn about the various opportunities to deliver internal auditing’s message to the people who will one day lead our global business community. Internal auditors are in a unique position to impart the importance of integrity within the professional arena. One such opportunity involves taking your message into the classroom. Practitioners can participate individually, or as part of a group organized by your chapter or affiliate. You can speak with elementary, middle, or high school students on a variety of topics including strong governance, tone at the top, and ethics.

The time commitment is minimal and the impact can be immeasurable. By agreeing to complete two to three hours of training and volunteering to visit an elementary school (a minimum of five times) or a high school (a minimum of eight times), you can be part of shaping the professional mindset of students who may one day be at the helm of the business community.