

## Integrating Issue Management and Strategic Planning: Unfulfilled Promise or Future Opportunity?

Tony Jaques

*RMIT University, Melbourne, Australia*

Issue management evolved from environmental scanning and other precursors to help business organizations recognize and respond proactively to an increasing variety of external issues beyond traditional economic and business-competitive challenges. Some early business scholars and practitioner advocates of issue management perceived an important link to strategic planning but their formative vision remains only partly realized in operational practice. This paper considers and compares the two disciplines, including the almost careless use of the word strategic and the need for a more versatile taxonomy. It then explores reasons why the early promise of integration has gone largely unfulfilled, and suggests ways forward to achieve greater alignment.

### INTRODUCTION

More than 30 years ago Ackerman and Bauer observed: “Social forces may have an impact on the corporation’s performance that is no less decisive than competitive conditions or technological development” (1976, p. 40).

A number of management initiatives emerged specifically to help address that challenge, none more important than the related disciplines of issue management and strategic planning. Yet, despite the work of scholars and practitioners, the full realization of effective linkage and integration between these and other management responses remains elusive.

Two early management innovations—long range planning and corporate social responsibility—were inventions of the 1950s, while strategic planning was born in the 1960s. Adoption of strategic planning was then so swift it has been claimed that few management techniques have swept through corporate and governmental enterprise more rapidly or completely (Murphy, 1989).

Also born in the 1960s was environmental scanning, which quickly gained widespread acceptance. One of its leading early proponents described it as a process which seeks “information about events and relationships in a company’s outside environment, the knowledge of which could assist top management in its task of charting the company’s future course of action” (Aguilar, 1967, p. 1). In this way environmental scanning was developed to bring broader trends and developments to the strategic planning process and with it a promise of integration.

But a survey of businesses as early as 1977 found that although all participants thought integration of environmental scanning and strategic planning was important, they all graded themselves as doing a “bad job” of that integration. The researchers concluded: “If firms merely establish scanning activities without integrating the results into their planning processes, the information will be useless to them. Indeed, in such cases, the faddish collection of unused environmental information may be short-lived” (Fahey & King, 1977, p. 62). They went further and predicted that continuous environmental scanning activity would “die of its own weight” if it could not demonstrate its broad utility to the planning process (p. 63).

From an early stage, the regulatory area was established as that which saw most scanning and monitoring, with an associated emphasis on those industries subject to a more regulated environment. One outcome of this focus on regulation and the public policy process was that corporate environmental scanning morphed into environmental, political and social *issue* scanning and monitoring, helping support the formal birth in 1976 of issue management (Chase, 1976).

Issue management originated as a business discipline specifically designed to enable corporations to participate in, and not just respond to, public policy issues which had the potential to impact them (Boe, 1979; Chase, 1977). Over the subsequent 30 years it has evolved – and is continuing to evolve – into a broader, more sophisticated discipline exercised not just by corporations but also by government agencies, not-for-profits and NGOs to develop strategies in relation to a wide range of public issues in their social and operating environment.

The evolution of issue management will be addressed later in this paper, but it is necessary first to review its early positioning within its business context, relative to other business disciplines. As issue management gained increased momentum in the early 1980s, organizations soon began to merge the environmental analysis function of policy and planning units with the issue management function of public affairs departments (Ferguson, 1993). In the process, much of the responsibility for the environmental analysis function passed from planners to communicators and an opportunity for improved integration was lost. Moreover, shortly after the establishment of issue management, the concept of strategic issue management (SIM) entered into common use and, as it assumed a seemingly distinct meaning, manifested another barrier to integration.<sup>1</sup>

## STRATEGIC ISSUE MANAGEMENT: A DEFINITIONAL CHALLENGE

One of the paradoxical distinctions between strategic planning and issue management is that while strategic planning has undergone substantial evolution over the decades, it has continued with a broadly unchanged definition, and remains a recognized formal planning methodology, primarily for business, government and major institutions. By contrast, the fundamental principles and processes of issue management have not changed substantially, whereas migration outside its business origins and dramatic changes in societal expectations have promoted a distinct evolution of its core definition. (For a discussion of changing terminology see Jaques, 2002.)

<sup>1</sup>SIM is sometimes presented as strategic issue management systems (SIMS). See for example Oliver & Donnelly (2007).

While dozens of competing definitions have been developed, this transition can be illustrated by just two polar examples:

- Public Affairs Council (1978). Issues management is a program which a company uses to increase its knowledge of the public policy process and enhance the sophistication and effectiveness of its involvement in that process (cited in Heath, 1997);
- Heath and Coombs (2006). Issue management is the management of organizational and community resources through the public policy process to advance organizational interests and rights by striking a mutual balance with those of stakeholders and stakeholders.

In addition to this definitional evolution beyond a purely corporate perspective, issue management has also spawned many novel constructs, which include strategic issue diagnosis (Dutton, 1993; Dutton & Duncan, 1987; Dutton, Fahey & Narayanan, 1983); crisis issues versus noncrisis strategic issues (Dutton, 1986); strategic issue scanning (Murphy, 1989); anticipatory management (Ashley, 1996; Ashley & Morrison, 1997); crisis issues versus opportunity issues (Ashmos, Duchon & Bodensteiner, 1997); risk issue management (Larkin, 2003; Leiss, 2001) and environmental issue management (Heugens, 2006).

By far the most important and pervasive of such constructs is SIM (see for example Ansoff, 1980; Camillus & Datta, 1991; Schwarz, 2005) which has added substantially to the current definitional ambiguity

It is generally unhelpful to get caught up in a cycle of dueling definitions, yet a proper understanding of the management elements is essential. At the heart of this is that the expression 'strategic issue management' offers two quite separate meanings: (a) strategically managing issues or (b) managing strategic issues.

The distinction between these two meanings is central, because the expressions issue management and strategic issue management have become virtually synonymous, spurred on by the notion that the only issues which merit management attention are strategic issues. In reality issues may be tactical, operational or strategic, and issue management as a discipline can be equally relevant in addressing each category. Indeed, responsible management should consider and assess all possible issues and contingencies, not just those in high priority areas.

In other words, not every issue is a strategic issue and not all issue management is strategic. Or looked at another way, not all issue management is management of strategic issues, although all issue management should be strategic in its approach and implementation. And of course not all strategic management is to do with issues.

Early scholars and practitioners focused on defining issues and issue management, and the added descriptor 'strategic' may have been developed in order to help position the burgeoning discipline as a strategic management function rather than to redefine either the focus or the process. Regrettably, just adding the word strategic in this context blurred its precise meaning and added further uncertainty to the relationship with strategic planning.

One of the earliest scholars to adopt this new terminology was Ansoff (1980) who said the concept of strategic issues first appeared during the evolution of strategic planning, but he made it clear that in the context of SIM, strategic simply meant important or significant. He also argued strongly that SIM is a process not just for planning the response, but for resolving the issue, and that unless those separate roles are established "SIM may degenerate into paralysis by repeated analysis" (p. 134).

Although most definitions of an issue suggested over the ensuing decades retain this action-orientation and outcome focus, an exception is the work of Dutton and colleagues (1983, 1987), who conceptualized and described the idea of strategic issue diagnosis (SID) and argued that strategic issues are “events which have not yet achieved the status of a decision event” (Dutton & Duncan, 1987, p. 280). Describing the need for a “wider-than-decision focus,” the authors described the need to avoid what they called “the boundedness of decision making” and “the constrictive and action-biased decision focus” (Dutton, Fahey & Narayanan, 1983, p. 321). They argued further that SID can take place *independent* of strategy. While the SID concept has retained some currency in organizational scholarship, it appears not to have gained wider academic support.

Meanwhile, permitting the expression SIM to become virtually synonymous with issue management has led to its own challenges, particularly a mistaken perception that issue management techniques should be applied only (or preferentially) to global or priority or corporate or key issues, and that the discipline has no application to local or tactical or operational issues.

There is good agreement that issue management should be a strategic management activity. For example, this is the meaning communicated in Heath’s pivotal 1988 and 1997 books which both include *Strategic Issues Management* in the title, and the 2008 revision (with Palenchar) of the latter. In stark contrast with this consensus there is an entire lack of any agreement as to what terminology specifically characterizes a strategic issue. Moreover, Dutton herself has argued: “No issue is inherently strategic. Rather, an issue becomes strategic when top management believes that it has relevance for organizational performance” (Dutton & Ashford, 1993, p. 397).

However, the fact that the CEO or a board member raises or recognizes an issue may warrant it getting special attention, but does not necessarily warrant it being classified as strategic. Conversely, an issue may become vitally important not because management believe it has relevance but because some outside third party creates that relevance. A good example would be when Greenpeace, not the management of Shell, decided that the deep-sea disposal of the Brent Spar oil storage facility in 1995 was an issue of national and international importance.

This is where an objective prioritization process proves its value. Many organizations face more issues than they can actively manage at any one time. The management processes for ascribing and assessing the organizational importance of an issue have been well described in the literature and include mechanisms such as the priority matrix and numerical scoring systems. A typical outcome is to assign first, second or third priority rather than to determine absolute priority versus nonpriority. Unfortunately, the result can be an erroneous conclusion that every issue that has made it through the screening process is, by definition, some form of priority issue and is therefore strategic.

One of the few scholars to challenge the apparent nexus between ‘priority’ and ‘strategic’ was Perrott (1995) who explicitly investigated the relationship between strategic and nonstrategic issues. He distinguished between strategic and operational issues, and clarified that not all strategic issues are high priority and nor are all operational issues low priority. Similarly, he showed that there are high priority operational issues and low priority strategic issues and that systems need to provide for these as well. Perrott also noted that issues which start off being perceived as operational may later be reclassified as strategic when the full potential of the issue is realized.

Another unfortunate element of this definitional challenge arises from the almost careless use of the word strategic in relation to issues. Hahn (1991) suggests that corporate strategic decisions have the following characteristics:

- They substantially affect a company's ability to generate cash and profits;
- They relate to the company as a whole;
- They are taken by the top executive team and the board of directors;
- They take effect in the long term and therefore tend to be made infrequently; and.
- They reflect the values of top management and are taken in accordance with corporate philosophy and culture (p. 27).

By these criteria many purported strategic issues would fall far short of the mark.

King (1984) suggested that the proposed criteria for an issue to be identified as "strategic" and/or moved along to the subsequent stages of the SIM process are strategy relevance (potential for impact); actionability (can we affect it); criticality (degree of impact); and urgency (time period when it merits/demands action).

Yet King's criteria differ little from the commonly accepted criteria for any issue which demands action (cf. Ansoff, 1980; Ewing, 1987; Regester & Larkin, 2002). What is needed is an expanded, more versatile, taxonomy of issues to provide a better definition of those which are important or key or major, without defaulting to the adjective "strategic." A product of this present terminological inadequacy is that strategic has become a synonym for important, and as a result the management of all important issues has become identified as strategic issue management, and by association can apparently be assumed to be part of strategic planning.

## ISSUE MANAGEMENT AND STRATEGIC PLANNING

One of the hurdles to properly addressing the relationship between issue management and strategic planning is that this lack of adequately distinctive terminology within issue management has led to an almost circular or self-fulfilling definition, i.e., strategic issue management deals with strategic issues, therefore issue management is strategic.

Indeed King (1984) proposed the rather unhelpful definition: "Strategic issue management is a process whereby strategic issues may become an integral element of strategic management" (p. 529). Following this approach, any issue strategically managed would constitute part of strategic management. But issue management as a discipline must make its own case for being strategic, and therefore its own case for being positioned to contribute to strategic planning.

In contrast to the definitional ambiguity surrounding issue management and strategic issues, the basic concept of strategic planning is much more assured, even though it has witnessed a distinct evolution of emphasis and methodology and the emergence of competing schools. One useful description is: "The elements of the strategic planning process concern an understanding of the changing environment in which a company finds itself, of the basic mission of the organization, of basic company purposes, of long-range planning objectives, and of programs, policies and strategies" (Steiner & Miner, 1982, as cited in Buchholz, Evans & Wagley, 1989, p. 39).

Drawing the link to issue management, Buchholz et al. concluded: "The ultimate purpose of environmental assessment is to identify major issues confronting business with sufficient lead time for proactive strategies to be developed. Strategic planning should be focused on these key

issues and the development of strategy and tactics to deal with them” (p. 46). While the descriptors used here are ‘major’ and ‘key’ rather than ‘strategic,’ issue management clearly provides identification and prioritization tools which can assist management in determining which issues warrant their attention. To help address this need, Ashley (1996) championed anticipatory management, which he defined as a systematic approach to anticipate issues early in their life cycle and to bring them to the attention of senior planners in a way which ensures that only emerging issues of strategic significance are considered, if not acted upon. This provides valuable lead time and better allocation of resources, as well as increased and informed and timely participation in dealing with strategic issues.

An example of the distinction between important and strategic can be seen in the current societal concern about climate change. It is undoubtedly a major global challenge, but for many corporations its main importance is within operational considerations such as selection of resources and the need to reduce global warming emissions from their own operations. But for other businesses, such as insurance companies critically concerned about rising sea levels and the frequency of storms, floods and forest fires, it must clearly be embedded into true strategic planning. (See for example Schanz, 2004, on the role of issue management in the reinsurance industry.)

The essential factor here is for issue management and strategic planning to work together. It is easy to get ‘carried away’ with strategies which may be appropriate for an issue, but which are not particularly appropriate for the organization and its other strategic interests (King, 1984). Or as Perrott said: “With a myopic focus in issues management alone there is a risk of losing perspective of the strategic framework and direction of the organization as a whole” (1995, p. 61). Rather than fall into the trap of excessive focus on labels and processes, it is sensible to assume what Perrott calls a “paradigm of strategic management behaviour.” Following this approach, he says that issue processing models need to be contained within the overall strategic management framework. Similarly, Bronn and Bronn (2002) proposed a greater focus on strategic thinking rather than just working on processes and structure.

But before it is possible to fully assume such a strategic orientation, it is helpful to better understand the formal interrelationship between the issue management and strategic planning functions. One approach is to attempt a definitional distinction. For example, Mahon suggested: “The emphasis in strategic planning focuses on identifying opportunities and threats to product/market issues. The emphasis in issue management is identifying and addressing social and political issues not usually resolved in the market place” (Mahon, 1989, as cited in Greening, 1992, p. 3). However, this has limited value. Some areas of management do naturally lie outside the normal purview of issue management – such as market share, new product development, logistics, credit control, customer interface and so on. But *any* area of management – if it goes wrong – can lead to public issues. It is clear that while external issues can lead directly to strategic planning policies (for example societal concern over the use of scarce resources impacting manufacturing choices) so too can strategic plans create an entirely new issue (for example a commercial takeover creating adverse consumer and regulatory reaction to new market dominance).

An alternative to the solely definitional approach is to specify broad areas of difference. One of the earliest attempts to distinguish and tabulate the differences was Ewing (1987, p. 19) who devised then elaborated upon this basic table (see Table 1). Table 2, based upon research and more recent scholarship, builds on Ewing’s approach. It also reflects a perception of how things often are as opposed to how they should perhaps be.

TABLE 1  
Ewing's Initial Comparative Table

<i>Issues Management (concerned with or can affect)</i>	<i>Strategic Planning (concerned with or can affect)</i>
Outside planning in	Inside planning out
Issues 1–3 years out in future	Issues 1–5+ years out in future
Operational (annual) plans	Organizational (long-range) plans
Defense/opportunity	Opportunity/defense
Best of contentious bargain	Best of self-created bargain

TABLE 2  
Updated Comparative Table

<i>Issue Management</i>	<i>Strategic Planning</i>
Flexible timing for real time response	Locked in to periodic planning or budget cycle
Sometimes isolated from Senior Management	Directly linked to Senior Management
Perceived as a cost to business	Perceived as an investment
Emphasis on social and political issues not usually resolved in the market place	Emphasis on opportunities and threats to product/market issues
Regarded as a communication activity	Accepted as a core business discipline
Compromised by historic association with 'spin'	Regarded as an objective management 'science'
Corporations may be reluctant to admit they are "managing issues"	No corporation would admit to having no strategic plan
Attempts to infuse current standards of corporate social responsibility	Attempts to balance social responsibility with corporate financial obligations
Outside-in focus (considers impacts on stakeholders)	Inside-out focus (search for opportunities and threats)
Focus on early identification of issues to manage their impact – either positive or negative	Focus on formulation of strategies to achieve positive organizational objectives
Produces an outcome	Produces a product, i.e., a competitive strategic plan
Evaluation is usually "soft," sometimes measured in terms of crises avoided or reputation preserved	Evaluation is usually "hard," measured in terms such as sales, production, market share
Able to respond to weak signals	Tends to respond to strong signals
Promotes nontraditional modes of thought and action	Emphasizes analysis and outputs by existing structure and power relationships
Stakeholder focused	Organization focused
Applies to business, not-for-profits, NGOs and community organizations	Primarily a corporate business discipline

Heath (1997) has warned that issue management cannot have its full impact if it is not part of the strategic business planning process. And despite so many evident differences between the disciplines, some early scholars (including Camillus & Datta, 1991; Fleming, 1980; Murphy, 1989; Sawaya & Arrington, 1988) remained optimistic about integration.

Camillus and Datta for example were concerned that an unfortunate outcome of the popularity of SIM was that it could be seen by its proponents as a panacea, and that SIM operated independently of strategic planning could lack focus, resulting in substantial resources being expended without realizing the corresponding benefits. However they also believed that the two could be

reconciled and integrated and that "A mutually supportive and, hopefully, synergistic relationship between the two systems is clearly desirable and possible" (Camillus & Datta, 1991, p. 67). Indeed, Camillus and Datta, like Arrington and Sawaya before them (1984), set out a diagrammatic model to graphically depict the integration of the two disciplines. Similarly, Bergner (1982) argued for more thoroughly and comprehensively linking issue management and strategic planning, particularly for multinational business.

Others have taken a much more pessimistic view, reinforcing the failed promise of integration. Near the beginning, Post, Murray, Dickie and Mahon (1983) surveyed 1,000 large- and medium-sized U.S. companies and found little attention paid to integrating public affairs activities or relating them to the corporation's overall strategy, and that what was originally conceived of as a comprehensive, integrated business planning process developed into two distinct activities within many companies.

Marx (1986), then Director General of economic analysis at General Motors, took a bleaker view of what he called the 'bifurcation' of functions. He argued that business success depends importantly on the integration of public issues management and corporate strategic planning and that few companies had effectively integrated these functions. "Corporate strategic planners focus their efforts on creating sustainable competitive advantages, while public issues managers try to anticipate and respond to a growing number of social problems with little appreciation for the firm's competitive position or comprehension of its long term business plans" (p. 141). He said the result is that social issues are not adequately addressed at the operating level, and business plan objectives are often not realized at the corporate level because of regulation or other forms of social constraint. Marx later added (1990) that strategic planning had focused almost exclusively on the economic environment, and that the incorporation of company values into the planning process had been narrowly limited to those business values which constitute the company's 'culture' and which contribute directly to the company's financial success.

Murphy (1989) was equally bleak about the effectiveness of strategic planning within organizations and about the relationship between theory and the practice. Murphy said issue identification was the control focus of strategic planning, yet in practice it lacked integration with decision-making processes, used inadequate scanning units and methods, and did not create viable alternatives.

In a similar vein, Preble (1997) said that while issue management helps develop sound offensive strategies in the market place, it pays inadequate attention to defensive actions which can help prevent crises. "The precise nature of these linkages is just beginning to be specified, integration into the prevailing strategic management model has yet to take place, and strategic management scholars and practitioners are, by and large, not yet embracing this connection" (p. 769).

This early pessimistic view was reinforced more recently by Regester and Larkin (2002) whose research among major public corporations in Britain indicated that while there was an acknowledgment by corporate communication and public affairs functions of the importance of managing issues, only 10% of the sample considered that their senior management proactively dealt with issues as part of the strategic planning process. Less than 5% considered their organization applied an integrated approach to linking planning, communication, regulatory and other appropriate functions – to assess, prioritize and plan for the potential impact of near and long-term issues on corporate objectives.

### POSSIBLE WAYS FORWARD

Although the scholars previously cited recognize that a closer relationship between issue management and strategic planning is desirable, that alone is not enough to make issue management integral to executive management and day to day operations. It must be integral to the strategic planning process itself.

Post et al. (1982) and Marx (1990) outlined an evolutionary approach, suggesting that the integration of issue management and strategic planning is a function of the maturity and sophistication of the individual organization rather than a function of the maturity of the two disciplines. In fact, Post and his colleagues posit a five-stage path along which companies travel in improving their effectiveness in dealing with change, from ignoring strategic planning and ad hoc issue management through to real integration (see also Carroll, Hoy & Hall, 1987).

A more specific approach is to study issue management as a discipline in order to determine how it could be changed to optimize integration. Nelson and Heath (1986) identified three causes of poor integration:

- lack of an issues management department resulting in the function being conducted by an ad hoc interdepartmental committee or being assigned to public affairs or government affairs
- lack of directional input into corporate strategic planning
- a credibility gap poisoned by some issue managers lacking good grounding in systems theory and organizational communication being regarded as interfering with rather than helping operations.

They suggested that addressing these deficiencies would help allow companies to “reassess their corporate goals, refine their codes of responsibility and accordingly alter their operating procedures to avert a collision with hostile and entrenched public sentiment” (p. 21).

Some early scholars proposed that, in order to promote integration, the environmental scanning unit be established within the strategic planning group rather than in public affairs to promote integration (Fahey, King & Narayanan, 1981). Or that rather than housing issue management with public relations, it should be positioned as an independent bridging function between public relations and strategic planning, with an eventual evolution to the planning function (Tucker, Broom & Caywood, 1992).

However, where the issue management and strategic planning staff are located, either organizationally or physically, is not the central issue here, and this idea has attracted less attention in recent scholarship. The more important structural challenge is that while the issue management processes and tools are typically ‘owned’ within the public affairs or communication function, implementation and ownership of issues themselves should clearly rest with the business units and corporate strategy. That is where integration can take place.

Any organization’s strategic planning system must develop to meet the needs of its business and its management style, and not blindly pursue a ‘best practice’ model. Similarly it seems clear that the real management objective should be integration of outputs and policy development, rather than a focus on processes or functions. When it comes to functions, processes, skills and personnel, complementarity is emerging as a more realistic objective.

The value of this approach is highlighted by the complementarity of the skills involved in the different functions. While top management involvement is essential for the success of both issue management and strategic planning (Ferguson, 1999; Heath, 1997; Larkin, 2003) there is added

value in some personnel being involved across both fields, where the disciplines represented are often very different. For example, individuals working in strategic planning have typically been trained in business policy, general management, accounting, international business and organizational behaviour, while those in issue management often come from political science, public relations, sociology, psychology, public administration, engineering, litigation, environmental management and communications (Preble, 1997). By pursuing complementarity rather than integration at a functional level, issue management can retain its strengths while broadening and strengthening strategic planning.

One modern mechanism for helping effect this complementarity, as well as bridging between functions, is the concept of the integrated or strategic communication planning process, which has developed strongly since the 1990s (Austin & Pinkleton, 2001; Ferguson, 1999; Smith, 2005). Ferguson, for example, argues that the volatility of the issues environment of many organizations necessitates the presence of a strong communication component in corporate plans, and that such communication planning should be seen as part of the larger strategic planning process rather than as a separate exercise. Moreover, she says that the strategic communication plan will ideally include an issue management component which identifies all the organization's issues, along with support plans to address the management of individual issues.

"Comprehensive planning," she concluded, "is a critical new communication function – a strategic function that must be integrated into the planning cycles of the organization" (Ferguson, 1999, p. 17).

## FUTURE RESEARCH

As issue management and strategic planning continue to evolve, particularly in response to new management ideas and changing societal, legal and regulatory expectations, the former dream of full integration seems destined to remain unfulfilled. Yet, there are substantial benefits to be gained from further developing and optimizing the two activities as complementary disciplines.

Beyond ongoing development of strategic communication planning as a formal corporate activity, it is proposed that the longer-term way forward lies in three key areas of future research – (1) development of a comprehensive theoretical framework; (2) adoption of improved cross-disciplinary taxonomy; and (3) better coordination between organizational and communication scholarship. In addition there appears to be real promise within the continuing evolution of the two disciplines of issue management and strategic planning.

### 1. Theoretical framework

While there has been extensive academic effort to conceptualize a general theory for public relations as a whole, there is currently no generally accepted theory of public relations. Nor is there consensus relating to issue management, where scholars have also explored a number of possible theoretical frameworks. For example, Heath (1986, 1990) has advocated a systems model for corporate issue management, and Bridges (2004) undertook one of the most thorough analyses of the field. Addressing six theoretical frameworks, she concluded that all were interdependent and that none provided definitive empirical evidence about corporate issues campaigns. Meantime there has been growing support, both in the United States

and Europe, for a systems approach within a rhetorical rationale (for example Bowen & Heath, 2005; Bronn & Bronn, 2002; Heath, 2006; Kuhn, 1997) as well as other specific concepts, such as the expectational gap construct (Reichart, 2003) and the symbolic interactionist perspective (Lamertz, Martens and Heugens, 2003).

While a detailed discussion of the theoretical literature is beyond the scope of this paper, it is clear that there is not yet agreement regarding a theoretical framework for either public relations generally, or issue management in particular. Without further research to achieve at least some degree of consensus, it remains a distant prospect before any comprehensive theoretical framework is likely to emerge to position issue management in relation to strategic planning.

## 2. Improved taxonomy

Lack of agreed taxonomy in respect of the related activities in this field remains a major hurdle to effective alignment, especially across disciplines. Heath (1990) said: "Issues management is not just communication, strategic planning, monitoring, forecasting or refining and implementing codes of conduct. It is all these and more" (p. 40). He concluded at that time, and again seven years later (Heath, 1997) that no definition of issue management had achieved consensus, and his judgment is equally valid today.

In the meantime, both issue management and strategic planning are facing encroachment or dilution by more fashionable developments such as triple bottom line reporting, corporate social responsibility, reputation management, corporate citizenship, risk management and managing sustainability, to name just a few. Most of these have arisen in response to changing societal expectation, and not all can be dismissed as "activity de jour." There is undoubtedly more to this than just management fashion, but one common factor is the highly fluid and sometimes contentious definitions of these parallel/overlapping developments. While excessive focus on defining and positioning individual element activities can be unproductive, further scholarship is needed to better define and explicate some of the competing activities, including both issue management and strategic planning, before it will be possible to reach consensus on their relative roles and relationships.

## 3. Coordinated scholarship

Neither of the aforementioned avenues of research can be successful without improved coordination across disciplines, particularly between organizational and communication scholarship.

Given the origins of issue management as a business-driven corporate activity, and given that its forebears included forecasting and future studies, it is not surprising that initial academic interest was in the business school environment, where early scholars focused largely on defining the terms and parameters of the new discipline and positioning it within broader corporate management, predominantly alongside strategic planning (for example Fahey & King, 1977; Fleming, 1980; Buchholz, Evans, & Wagley, 1989). An alternative approach is to assess issue management within a statistical and economic analysis (Stanley, 1985).

Among the first scholars to explore issue management more specifically within the context of formal communication studies were Crable and Vibbert (1985), followed by Heath and Nelson (1986) whose innovative monograph *Issues Management: Corporate Public Policymaking in an Information Society* was introduced by the pioneer Ewing as "the first in-depth analysis of the new management technique from the standpoint of communication theory" (p. 7).

Since that time there has been very little coordination or consensus between the organizational and communication literature. For instance, as previously cited, Dutton has written extensively with colleagues on issue labeling and selling and on the identification and diagnosis of strategic issues. Yet in this important scholarship, her conception of a 'strategic issue' relates primarily to business/investment problems, not 'public issues' in the sense used by communication scholars, NGOs and government agencies.

Issue management is taught in a variety of academic contexts – such as business schools, media and community studies, and schools of applied communication – and consensus between different schools is notoriously difficult. But a good starting point would be improved cross-disciplinary dialogue and coordination, even if only to identify and agree on the areas of difference. That step alone could help promote improved alignment between issue management, strategic planning and the other current and emerging activities in the field.

### EVOLUTION OF THE DISCIPLINES

It now seems possible that hope for complementarity of issue management and strategic planning may in fact lie with the more recent development and evolution of the two disciplines.

In the case of issue management, the adoption of its techniques by community groups and NGOs in different parts of the world to respond to societal issues was an obvious development (Beaudoin, 2004; Bond, 2007; Jaques, 2006). Government agencies have also adopted issue management, not to resist or modify public policy as originally conceived by the corporate founders of the discipline, but to promote and implement such policies. For example, Minnis (2001) has described the adoption of issue management by public sector wildlife management organizations in the United States, and Ferguson (1993) has analyzed the adoption of issue management by Canadian government agencies. Similarly typical case studies have addressed the growing public sector use of issue management, for example by Australian local government to engage activist communities (Galloway, 2005); by the Nigerian military government to restore its reputation (Ogbondah, 1999); and by a Swiss telecommunication regulator responding to proposed change (Illia, Schmid, Fischback, Hangartner & Rivola, 2004).

More importantly business organizations have increasingly had to recognize and adapt to the fact that NGOs are utilizing this new influence to help set regulations that have a direct impact on organizational planning (Blood, 2004; Doh & Guay, 2006; Holzer, 2008; Nalinakumari & Maclean, 2005).

At the same time strategic planning as a management discipline has also seen evolution that holds promise for greater involvement with these increasingly active external parties. The early days of formal strategic planning saw dominant influence of the design school, built on the assumption that a best answer exists for the problem, based primarily on logic and control, not on experience derived from intuition. In an astute comparative analysis of the evolution of strategic planning, Sloan (2006) described the development and rise during the 1990s of the emergent strategy school, which by contrast is aligned with a learning belief that strategy making problems have no single correct answer, that business leaders have agendas and actions influenced by politics, history and human patterns of behaviour over time, and that strategic plans develop on the basis of actions that the organization takes in relation to internal and external pressures.

While it is recognized that the struggle between the two schools of strategic planning continues to this day, the complementarity between issue management and the emergent school is strong, particularly in respect to providing a planning framework in which organizations can demonstrate improved identification of and response to public issues.

As Sloan concluded (p. ix–xx): “The process of creating strategy through critical reflection and dialogue in a continuous cycle of learning is what links it to excellent performance. It is the quality of this reflection and dialogue that makes a significant difference in the quality of strategic performance.”

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