



# The Scrappy PR Pro's Toolkit: Winning with Less



**Felicia Perez, MA, APR**  
Owner, FAR Public Relations

# What we will cover today

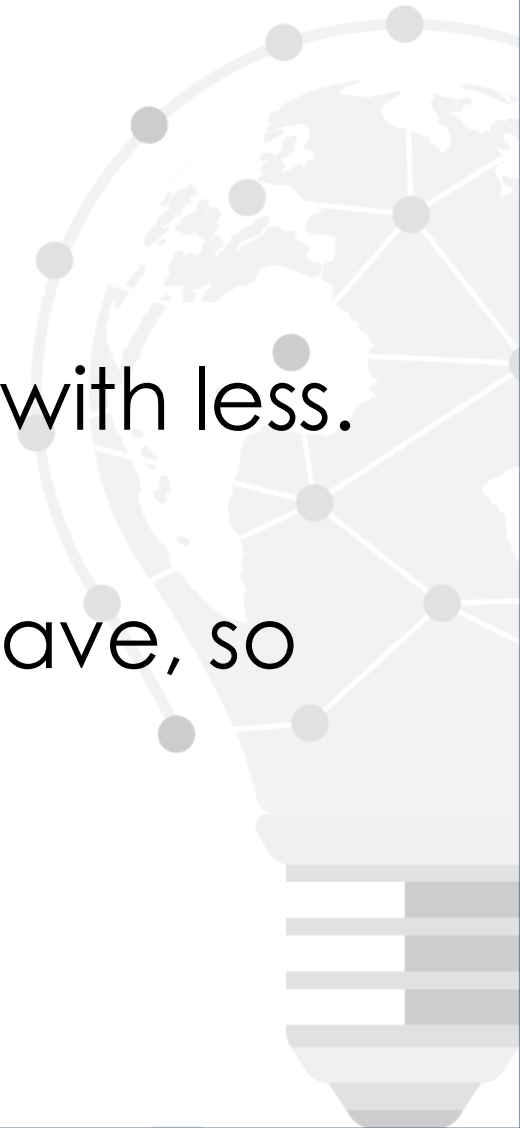
- Tools in your toolshed
- Mindset shift: talking “boundaries” and “balance”
- Session worksheet



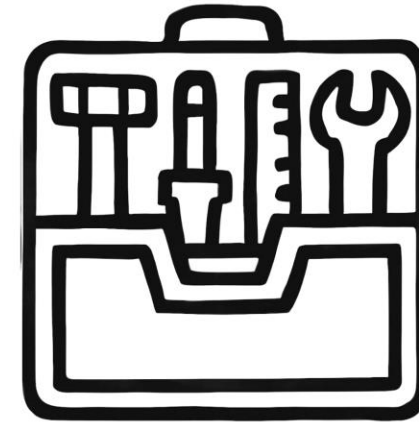
# KEY TAKEAWAY

Being “scrappy” doesn’t mean doing more with less.

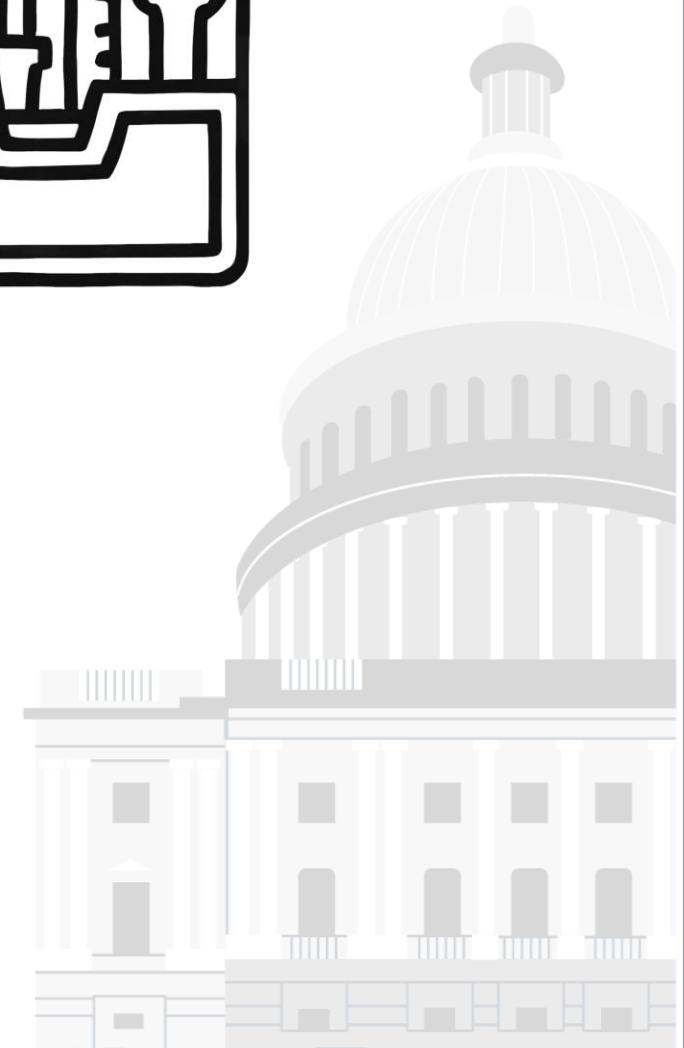
It means being *intentional* with what you have, so you don’t burn out or break.



# What's in your Toolshed?



1. Tech & Biz Infrastructure Tools
2. Systems & Admin Tools
3. Networking Toolbox
4. Content & Production Tools
5. Media Relations & PR Tools
6. Brand & Thought Leadership Tools



# 1. Tech & Biz Infrastructure Tools

For those of you who are starting a business...

To guide you through the process:  
**FIRST, CREATE A BUSINESS PLAN!**

- CPA (first expense!)
- FINANCING (e.g. Quickbooks or Freshbooks)
- Contracts & legal (other agency owners may help!)
- Time tracking (I keep track by color-coding my calendar)
- Website & branding (Wix, Squarespace, Wordpress)
- Communications (e.g. professional email, phone, virtual options like Zoom)
- Reliable transportation
- Low-volume workspace (no, not just your neighborhood coffeeshop)

## 2. Systems & Admin Tools

Keep your business organized to prevent burnout!

- Project management tools (e.g. Asana, Trello, Clickup, Monday, Basecamp, etc.)
- Proposal template (know your services & your worth)
- Shared drive & file system (e.g. Google Suite, Dropbox, Box, Sharepoint)
- CRM to track relationships (e.g. Hubspot, Zoho, Monday, etc.)
- Appointment scheduling (e.g. Tidycal, calendly, etc.)

# 3. Networking Toolbox

Manage your "inner circle" and network! The PEOPLE you know is your most treasured asset as a PR professional.

**PLUS!** Scrappy PR pros win faster when they have people they can call.

- “Keep you in business” crew  
(logistics with CPA, attorney, bookkeeper)
- Specialists in the field  
(graphic designers, photographers, event planners, videographers, editors, web designers, marketers, copywriters, etc.)
- Mentors & peers  
(pro tip: get involved with PRSA, IABC, AMA, NAWBO, chambers, etc.)
- Vendor connections  
(print shops, promotional materials, etc.)
- Personal support  
(spouse, friends, family, therapist... and even your dog)
- Community & media relationship  
(relationships are currency in PR!)

# 4. Content & Production Tools

Create professional content as a high-end agency without the high-end cost

**Pro Tip:** Apple products work seamlessly together

- Smartphone and laptop (reliable products)
- Content Planning (e.g. Meta, Sprout, Hootsuite, Metricool, Notion)
- Video hardware (I use GoPro, tripod, mic and soft lighting for events and BTS content)
- Canva Pro (a MUST!!)
- Adobe Suite (whether you're editing video or pdfs; can also try Wondershare)
- Email Marketing Tools (e.g. Mailchimp or Constant Contact)
- Social Media Tools (e.g. CapCut, Descript, iMovie, OpusClips, Minvo)
- AI and editing tools (Get friendly with AppSumo and ChatGPT)



# 5. Media Relations & PR Tools

You DON'T need a giant tech stack, just essentials to offer client ROI.

## Shared Profiles:

Meltwater

Muckrack

Critical Mention

Cision

TV Eyes

Press Ranger

- Media list building
  - eg. Muck rack, Google, LinkedIn, Cision, etc.
- Media monitoring
  - eg. Google alerts, Meltwater, Critical Mention, etc.
- Pitching and follow-ups
  - eg. Email, Microsoft Excel, Google Sheets, Meltwater, Critical Mention
- Wire distribution
  - eg. EIN, Globewire, PR Web, Business Wire, etc.

# 6. Brand & Thought Leadership Tools

Position yourself as an authority.

That means LEAPING over your IMPOSTER SYNDROME!

Create a referral network!

- Update headshots and brand images
- Manage your LinkedIn profile
- Gather Testimonials & Case Studies
- Set goals for:
  1. You
  2. Your business
  3. Your brand

All 3 may be synonymous

# 'TREAT' YOURSELF: PR TAKEAWAYS

**Gummy Bears:** Be approachable and authentic

**Skittles:** Know your audience flavors

**Airheads:** Don't be an airhead. Do your research!

**Nerds:** Smart PR uses data, of course

**Starburst:** Lead with a burst and a great hook!

**Twizzlers:** Keep your messaging aligned

**Sour bite crawlers:** Dig for every story angle

**Sour Patch Kids:** Gotta take the sour with the sweet

**Hershey Nuggets:** Find that newsworthy nugget in your story



# MINDSET SHIFT: IT'S NOT JUST BALANCE...



A 2024 study of 715 freelancers found **45% reported a decline in their mental health** over the past year.



**71.9%** of freelancers reported feeling isolated or lonely sometimes or frequently.

**43% of freelancers** reported burnout from long work days and **64.3% reported burnout** from lack of work-life balance/time off.



SOURCE: FREELANCE SUPPORT AND FREELANCER MAP

# Mindset Shift

It's OKAY to say NO.

## **REMEMBER:**

Your BRAIN is your money-maker.  
Take care of it.

- Setting boundaries
- Calendar blocking
- Therapy or coaching
- Peer accountability
- Healthy workplace setup



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[felicia@farpublicrelations.com](mailto:felicia@farpublicrelations.com)