Charting Your PR Measurement Strategy

Articles by members of the Institute for Public Relations
Commission on Measurement and Evaluation

Contents

The strategic approach: Writing measurable objectives

By Don W. Stacks, Ph.D. and Shannon A. Bowen, Ph.D.

During the last five years, we have judged several PR campaign competitions. There is one thing that most of these campaigns have in common: a lack of measurable objectives. In many cases, there weren't even stated goals. In today's world, clients want to know what the PR function has produced that leads to some type of return on investment (ROI).

How then does the PR function prove its worth? As with any campaign, a clearly defined program of communication helps establish that proof, beginning with a baseline against which to measure success or failure, and moving through benchmarked points where certain objectives are evaluated.

Goals vs. objectives

Of course, all campaigns begin with a goal in mind. This goal should reflect the needs of the internal or external client. But a goal is just that — a broad idea of what you would like to happen. For example, our goal here is that the reader understands the difference between a goal and an objective. An objective is a clearly defined statement that includes an action statement (a verb), a timeline and a measurable outcome (usually expressed as a percentage). Thus, our objective at the end of this article could be to increase the percentage of professionals who have submitted campaigns to some competition with measurable objectives from 10 percent to 60 percent by 2012. The keys to this objective are what we want to happen, how much of an increase we seek and when. The measurable aspect of a campaign is the inclusion of measurable objectives.

The three objectives

There are three PR objectives found in any campaign: informational, motivational and behavioral. They occur in a logical order. First, communication must occur; that is, the information must be sent, received and understood. Second, the public, stakeholders or audience must be motivated by that communication toward the intended action. And, third, the target should adopt the desired behavior.

The first objective deals with getting the information to the appropriate audience, consisting mainly of outputs (press releases, VNRs, tweets, etc.) and is a simple count.

Beyond that, however, we can also write informational objectives that deal with recall and understanding of that information. Measurement of informational objectives includes counts of sent releases, number of picked up releases, number of receivers who can accurately recall the release and remember its key messages and so forth.

The second objective deals with motivation. This consists of outtake measures where we have targeted opinion leaders or selected audiences and assess their agreement with messages and their intended behaviors.

Measurement can consist of content analysis of opinion leader columns, blogs, tweets and other content for tone (positive, negative, neutral), share of voice (competition mentions) and accuracy. It can also look at subsamples or segments of the target audience to gauge message acceptance or rejection, degree of interest and projected decisions about adoption of the campaign outcome.

Third, the behavioral objective projects to the final outcome of actual expected behaviors — these are the actions that count toward proving return on the PR investment, such as purchasing behavior or voting intention.

Measurable objectives can be thought of in terms of the marketing model AIEDA: Awareness, Interest, Evaluation, Decision and Adoption. Informational objectives state expected awareness and retention from some baseline, or phased increases in awareness and retention of that information.

Motivational objectives state interest and evaluation, also against some baseline or phased expectation in terms of attitudes and beliefs regarding the campaign object.

Lastly, behavioral objectives state expected increases in expected decisions to adopt and, of course, final adoption or purchase or recommendation, or the intention and the likelihood of doing so.

Strategic campaigns

In the end, the more precise any campaign is in stating its objectives, the better it can respond to changes and challenges. If information is going out but is inaccurate or not being picked up or repeated, then it is not going to influence adoption decisions.

If opinion leaders and targeted audiences are not motivated by the campaign, then look back at the information and re-evaluate the message and channel strategy. If intended behavioral decisions are not being made by the targeted audience, then look back at both motivational and informational strategies.

Reassessing the effects of communication in this manner keeps your campaign strategic, or focused on reaching the objective as efficiently and quickly as possible. That strategic approach to objectives supports and furthers the ready achievement of goals.

Measurable objectives not only provide a way to demonstrate PR's return on investment, but also provide the data needed as the campaign unfolds to refine strategy.

A final caveat: Once a campaign begins, the competition in that particular sector or market should be expected to counter. Having data on phased objectives provides an early-warning system that should result in real-time strategy revisions, making the process truly strategic.

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How to write clear, measurable campaign objectives

1. Differentiate between goals and objectives.
2. Conduct research into the baseline data from which success or failure at specified campaign phases and the campaign end can be judged and evaluated.
3. Refine the research objectives associated with each objective. How will the data be gathered and evaluated — physical examination of content, in-depth interviews with opinion leaders, surveys of targeted audiences, tracking products or commentary.

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Deliverable objectives:
Considerations for creating measurement plans
By Jackie Matthews and Pauline Draper-Watts

Beginning or improving your measurement system requires thoughtful consideration. But before embarking on any research, it is important to establish your objectives.

Know what you are seeking to accomplish with the research, who will be using it and who your results may impact. Invariably there are multiple stakeholders who have an interest in the findings.

In some cases, this is a small group of individuals, while at other times it may be multiple departments across various geographies. Investing time at the beginning helps gain buy-ins from interested parties. Determine common objectives and/or key performance indicators (KPIs) to shape the measurement and foster cooperation. But as you navigate this process, don't lose sight of the big picture.

Setting goals

Often, the first impulse when discussing measurement is to jump into deliverables and vendors. Resist the urge to rush here and carefully identify objectives. Beginning with a well-defined goal is the most important part of any measurement plan. This underpins and determines what data you need to collect.

Spend time developing your objectives/KPIs and ensure that everyone involved is in agreement. For some projects, the objectives phase will feel like an incredibly painful process, but it is essential to create an effective plan.

To begin, here are the first questions you need to ask yourselves:

- Key decision makers: Who are the key internal stakeholders? Ultimately, who will be using the research and who will need to see it? What role will the stakeholders play in determining the objectives?

- Research objectives: What is it that you are trying to measure? What will success look like?

- Research population: Who or what are you researching? If you are doing primary research to understand how you have influenced a particular group, then you will need to define the group so that you know how to find them. If you are looking at news or social media to understand if key messages are being picked up, then you need to determine the primary targets.

  Do you have a list of the most influential publications in your industry? Do you have a targeted list of media or bloggers that you are trying to influence? What will the

benchmarks be — comparing your company with the competition, looking at your company during different time periods or a combination of both?

- Data usage: Will you be tracking continuously or will it be episodic? Will you need high-level executive reporting for management and more detailed information for the tactical level people? Will quantitative data be enough or will you also need to get at more qualitative measures?

- Resources: What resources are available to you? Are there people that you can assign to the project? How much money has been allocated to the project?

Selecting the right vendor

Once you have answered all these questions, met with the key decision-makers to garner their support, determined the clear objectives and research questions you are seeking to answer and identified the resources available to you, it is time to consider research vendors.

To start, create a list of vendors who specialize in the types of data that you need. As with all research, you need to develop a criteria list prioritizing what is most important for the project.

As part of the decision-making process, you need to also ask your research provider for the following information:

- References: Make sure you get references from their other clients. The research provider has hand selected these clients and therefore is probably going to be more positive, but they can offer valuable insight. Ask how long they've been a client, what has been the best use of the data/what wins have they gotten with their management using the provider's data and what weaknesses or issues they've encountered. Also, how responsive has the provider been to questions and have they followed through on promises?

- Account team: Understand who your project team will be. What are their backgrounds? Do they have experience within your industry or with your product category? What roles will each of the people on the account team play? Can you see yourself building a good relationship with them? And, in case of a worst-case scenario, who will be the go-to person at the end of the escalation chain if there is an issue on your project?

- Pricing issues: What are the items that are specifically included within the project scope? Are there other offerings that are related that you may not have asked about? Are there limitations to the pricing as indicated within the project scope (e.g., limitations on number of articles or respondents before additional charges are incurred)? How flexible is the company to make changes and what are the cost implications?

Choosing a research provider

If you are conducting news or social media analysis, then there are several considerations when selecting a research provider. You must determine how the data will be sourced: Will it be collected via a clipping service, an aggregator like LexisNexis, a Web crawler or a

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combination of these? If a Web crawler is used, how deep within a website does it go? Does it only collect data on the home page or does it go deeper?

You also need to understand the criteria for how the data is collected. Does the provider use key words, logic, search strings, etc.? What, if any, cleaning criteria is used on the data? Is there a minimum amount of content that must meet the criteria for a story to be kept as part of the project? How long do they store the data? Can you access the data for yourself and will your agencies have access to it?

The quality of the data will directly affect the results, so it is important to understand what you will be measuring.

Understanding methodology

You need to understand the research provider's analysis methodology. Do they use computer coding, human coding or a combination of both?

Computer coding may be enough for some projects, but more detailed projects may require some level of human coding. Computer processing for factors such as tone, messaging, attributes and implied communication is not advanced enough to provide accurate results.

Finally, you need to know if the vendor uses any specific weighting or analysis formulas. If so, then learn the inputs for those formulas. If the vendor won't tell you what goes into them, then reconsider whether they are the right vendor for you.

Remember, you need to be able to explain any analysis that you receive from them to your internal stakeholder groups. Make sure you understand the analytics that are being used.

Delivering results

Having gotten this far in the project, you are the best-placed person in your organization to understand how the reporting will be used. Therefore, you need to ensure that the reports will deliver against your objectives in a usable form. This includes quality, timeliness, content and format.

After you've selected a research provider, it is time to get started with your new program.

Measurement should be a process, not just a one-time event. Periodically revisit your objectives to ensure that they are still valid and update them as necessary. As you accumulate more information, you should evaluate the findings and adjust your focus accordingly.

Only measure what matters. Measuring everything isn't important; only measure what you can actually affect. Keep this larger perspective in mind as you revisit and clarify your objectives.

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Speak their language:
Communicating results to the C-suite
By Marianne Eisenmann

In this era of increased accountability, communicating the results of your PR program to your CEO, CFO and CMO is critical. Demonstrating the value of public relations helps maintain or increase budgets and resources, helps you gain a seat at the table with other decision-makers and helps ensure ongoing support with non-financial resources such as access to spokespersons.

Apply what you know as a professional communicator to effectively communicate to the C-suite. Understand your audience, their needs and priorities.

For example, in preparing a report, recognize that the executive does not have time to read a lengthy document. Tell them what they need to know right away, so they can make decisions quickly. Provide top-line results but have the backup data ready if someone asks for more detail.

Get to know the C-suite executives with whom you wish to communicate. Find out what is top of mind for the CEO, what keeps the CFO awake at night or what misconceptions a CMO might have about media or PR outreach. Consider what format he or she typically prefers to receive information — bullets, tables, graphs or other visuals — and then deliver your information accordingly. If other departments have hit on a communications format that works, then mirror it. Thinking through the answers to these questions should help you tailor your reporting and make your communications more effective.

Give them what they want

The best approach is to tell a story in one or two pages in a scorecard or dashboard format using graphs or other visuals — more of an elevator read than a thick doorstopper. Use headlines or bullet points to bring your key points home instantly, avoiding extra details. Senior executives understand and expect to see data and numbers so don't be afraid to use them. Avoid PR jargon — speak their language.

Link PR achievements directly to business goals so that C-suite executives will see what PR results mean to them, and why they should care and continue to invest. For example:

- The percent of overall media coverage that appeared in priority outlets regularly read by customers or other stakeholders

- A competitor analysis highlighting gains in share of voice which can increase your organization's visibility in the marketplace

- A trend analysis to highlight the percent change over time for all your metrics — the C-suite will want to know when improvement has occurred

- A pie chart detailing what percent of media coverage each PR activity generated

You may want to add a qualitative measure, too. Demonstrate how the time invested in your efforts has paid off in terms of positive coverage, a favorable headline or delivery of key messages that will, over time, impact sales or other business goals.

Don't limit your scorecard to media results only — relationship building is part of public relations too. Consider highlighting briefings with key journalists and bloggers, community outreach or partnerships that PR initiated, or support for other business units.

Be sure to show how public relations drove target audiences to heed a call to action. For example, did proactive media coverage drive visits to your website or downloads of your information? Can a published newspaper story be linked to more donations made at a cause-related website? Did a piece on the evening news result in more entrants in your competition? Did a posting on a popular blog connect with key targets and lead to additional signatures on your petition or letters to members of Congress? Draw these kinds of conclusions when reporting results. This will let the C-suite know that PR efforts are reaching interested audiences.

Make it matter

The C-suite will be interested to know if or how social media is helping to drive its agenda. Don't share mere popularity data about number of fans, likes, followers or retweets. Hone in on an especially meaningful conversation, link sharing, successful blogger outreach or comments posted on the CEO blog which have a favorable impact on your organization or industry.

Use a few anecdotal comments to put the data in context. This could be a quote from an article or feedback from a stakeholder. If you are justifying your strategy or budget to overcome unfavorable coverage, then include a negative quote to emphasize the need for investment in proactive measures to balance the media environment. If the CEO is convinced that a certain journalist is unfavorable toward your organization, then use your data to refute a misconception or illustrate the accuracy of the perception as a prelude to a recommendation on how to deal with the reporter.

Consider a scorecard as more than just evidence of the contributions of the PR team. You may use a scorecard as a planning tool to identify next steps or best practices. Your C-suite executives will ask, "what are we going to do next," so be sure to include recommendations for next steps that reflect the learnings from the data and link to the C-suite goals.

Don't be afraid to include other data — like market share increase, sales numbers or earned vs. paid media results — to demonstrate how PR efforts have helped shape the overall business landscape. Try to correlate PR efforts to market research findings about shifts in customer opinion, awareness or attitudes.

For example, if public relations has been focusing on the West Coast regional media all year and research shows an increase in sales in the region, then be sure to associate the two.

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If the C-suite has its own scorecard, then you may want to suggest a few of your own tracking numbers that could regularly be included. These key performance indicators (KPIs) could be quantitative around competitor share of voice or qualitative tracking key message penetration. When setting KPIs, remember that you need to achieve them.

Once you have created a format for your scorecard, be consistent so there is familiarity and recognition, but include a dynamic section to profile something that will leave a lasting impression — a great media placement, PR's contribution to the success of another business unit or something anticipatory, like the number of confirmations for the next week's media event.

Timing also impacts the content of your report. Monthly may be too often if you don't have enough to say. The report may be seen as boring and lead the C-suite to tune out your messages. Quarterly or half-yearly usually makes more sense.

When deciding on frequency of reporting, consider several factors:

- Your PR program's activity

- Cyclical factors like seasonality or key industry meetings

- The rate at which external events are progressing and how often the other functions report.

Remember, all of this needs to be in a visual one or two pages designed to showcase the value of public relations, and ultimately allowing C-suite executives to make decisions based on data — not gut feelings.

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The big shift: Moving from impressions to engagement

By Tim Marklein

One of the biggest challenges facing today's communication leaders is how to navigate the shifting media landscape. Most have embraced or at least accepted the emergence of digital and social media, and now they're asking critical questions about how they should evaluate this work and how it measures up against traditional media efforts.

The good news is that marketers and communications have a variety of metrics available. For traditional media, it has become standard practice for communicators to track reach, share of voice, key messages and themes, sentiment, third-party quotes, etc. Social media is easier thanks to online tools and open interfaces. Real-time data tells us how people consume and share content, how people participate in communities, how people engage with brands and what actions they take.

So, what should communication leaders do with all these metrics? Can they integrate online and offline data into a more holistic view? If so, then how do they fit together?

Recommendation #1: Get "inline" with your analytics.

The simple answer is yes, companies should take an "inline" view of the world. Customers don't strictly separate their interactions by channel any more than they neatly align into traditional demographics.

We encourage clients to integrate their analytics across multiple media channels, marketing disciplines and data sources. Smart brands learn from every interaction, and corporate leaders realize that reputations can be won or lost instantly — regardless of where the conversation starts. The most valuable insight often comes from the intersection of data across channels or disciplines.

This is the hard part: Marketing and communications are in the midst of a major transformation from an impressions-dominated world to an engagement-driven future. The impressions discipline focused on reaching many people efficiently through an orchestrated mix of mass media and direct marketing, typically in one-way broadcasts. Engagement rethinks both the mix and the approach, focusing more on dialogue, small groups, storytelling, interactivity and narrowcast media.

From a measurement standpoint, this gets tricky. Mixing impressions and engagement data can be confusing or distracting if you're not careful. For example, how do you compare a USA Today print story to a WSJ.com online piece to an industry blog post to five customer tweets? They're obviously different media types, each of which people consume and share differently, and each of which has a different impact on attitudes and behavior.

Recommendation #2: Track engagement and impressions in parallel.

At the risk of oversimplifying, we recommend that clients expand their mindset to track impressions and engagement together. The first is still a valuable measure of reach, whether it's traditional, digital and/or social media. While some would argue for ditching impressions altogether, the pragmatic reality is that impressions and CPM are a common language across marketing disciplines and that integration value is important to maintain.

Engagement data is even more critical and needs to be elevated. Most communicators know that certain ideas, stories and campaigns will engage some people more than others. Communicators see and feel it every day — just listen to radio call-in shows — but it's hard to quantify offline. This isn't the case online, where marketers are awash in data (much of it is free) that tells them how many people visited their site, how long people watched a YouTube video, how many people signed up to "follow" or "friend" you — and in some cases, how many people bought how much of your stuff online.

Recommendation #3: Contextualize.

The basic metrics for impressions and engagement are pretty common. Whether it's "print impressions," "unique visitors" or "time spent on site," you can track each with some consistency regardless of what organization you represent. What will vary is which metrics matter most, and how to track the data in the context of your organization's engagement flow.

For example, if you're targeting consumers, then *USA Today* (3.3 million daily readers) might be valuable to you because of the audience and media context within which it appears. If you're targeting business leaders, then WSJ.com (12 million monthly readers) is probably more beneficial in reaching your broad audience. The industry blog (10,000 daily readers) might be a more targeted way to reach specific decision-makers who would buy your company's product.

Even in an impressions world, this example reinforces a need to go beyond total numbers to focus on targeted impressions that reach the right audiences.

Now let's add engagement into the mix. Generally speaking, people consume daily newspapers in a passive way with limited engagement. While newspapers certainly impact opinions and behaviors, that impact is hard to track and fragmented across a broad audience. With the WSJ.com piece, by contrast, advocates and detractors alike can easily share it via email, blogs and Twitter. The industry blog might only have 10,000 readers, but they might be "the right 10,000" — and if it's a good blog, then they're actively sharing, debating and commenting on the post, which extends the reach through trusted peers and leads to even more engagement.

You may need to adjust the scale of your metrics.

Based on our experience, companies often need to re-think the scale of their metrics as they transition from impressions to engagement (or both in parallel). Impressions usually come in bulk, and many marketers are hooked on big impressions numbers and low CPMs. Some will balk at shifting time and resources from mainstream media to more targeted conversations and narrowly defined communities.

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More important, communication leaders will need to re-train their executives and marketers to think differently about how they evaluate communications. They will need to embrace new metrics and partner with sales leaders and Web teams to connect the data — and ultimately determine what matters most in the context of their business. That's when measurement will really pay off to drive new behaviors, investments and outcomes for the organization and its stakeholders.

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Measuring influence in the digital age:
Impressions, likes and followers

By Katie Delahaye Paine

Back in the days before Facebook and Twitter, before crowdsourcing and clouds, media relations professionals turned to spiral-bound directories to identify which publications would best reach a specific audience. The outreach was based on readership surveys that purported to tell you who was reading what publications. But those surveys disappeared around the time that we stopped dialing telephones.

When online media came along, PR people scrambled to find new ways to assess which sites reached their target demographics. The alternative to the readership surveys were panels set up by Nielsen, ComScore, Compete, Quantcast or Alexa with opt-in systems to record what people are really doing on their computers. The numbers varied dramatically, but at least you could find data for most of the major online news outlets.

The rise of social networking

But then there was Facebook. Because it was a closed and diverse network, it was nearly impossible to accurately count "impressions."

People created Facebook pages and started confusing influence and relationships with Likes, forgetting that they were just counting clicks. This doesn't indicate whether there is an actual relationship with the brand. Never mind that most people hit Like because they were promised a 10 percent off coupon and never came back. Growing the number of Likes became the ROI of the day — except that it wasn't ROI and wasn't an effective measure of impact.

Along with Likes came another equally insidious metric: the number of Twitter followers. It became all the rage to grow your Twitter followers as quickly as possible.

So people figured out ways to auto-follow people and numbers grew faster than Justin Bieber's fan club. Of course, most of those followers were faux followers, who essentially never pay any attention to what you're doing, but the numbers were big and so bosses paid attention.

But, then, the numbers got too big. PR people, who were used to crowing over getting 50 great "placements" or increasing the numbers of "media hits" from 100 to 200 per month, were now seeing 10,000 or 20,000 "hits" in social media. At first it was impressive, but when people started digging into those pretty line charts and bar graphs and realizing how much of this information was irrelevant, they became nervous and overwhelmed.

So if you only want to measure what matters, how do you sort the good stuff from the trivial when traditional directories aren't accurate and can mislead you?

Consider the following steps:

Step 1: Choose your words carefully. Influence is not reach. The leader in this misnaming contest is Klout, who says it wants to be the Nielsen of social media and the arbiter of influence. I applaud its ambition, but that assumes that its magic number will tell everyone how "important" a particular outlet is. The problem is that any given outlet may be important to me, but impotent in a different marketplace. And an outlet with anemic Klout scores may be incredibly influential in a niche marketplace.

Step 2: Behind all influence is action. Influence, according to dictionary.com, is the capacity or power of persons or things to be a compelling force on the actions, behavior, opinions of others or the action or process of producing effects on the actions, behavior, opinions of another or others.

Please note that the operational words are actions, behavior and "produce effects" — in other words, Justin Bieber may have millions of fans on Twitter, but it's a good bet that he is never going to produce any effect on my business. Now, if I was selling eggs and Bieber decided to go on an all "KDPaine brand eggs" diet, then it might be different. But the point is that influence is not reach, it's the power to produce an effect or an outcome. So you need to measure a person's influence score based on the impact on your business.

If you are a defense contractor, and there are only 200 people on the planet who can legally buy your product, then chances are it's not the number of followers you have on Twitter that matters.

What matters is that you are reaching those 200 people and the 2,000 or so people who influence them. That means that the reporters and thought leaders who have always written about your business are still writing about your business, you just need to figure out what blog, Facebook page, LinkedIn group or Twitter handle that they are using today.

Step 3: Behind every influencer is a real live human. Influence is not a list, and it can't be used like those old media directories. Influence implies a personal, persuasive relationship between the individual and the audience who is being influenced. Investor relations professionals would never dream of relying on mass emails to explain a new strategy to a financial or industry analyst. Today's influentials aren't any different. You can't substitute personal relationships for electronic ones. Do not rely on computers to figure out who is important.

For example, a lot of publicists assume that because my blog is called "The Measurement Standard," I'm interested in your new, more accurate scientific probing device. I am not.

Read what the person has written or posted and understand what excites them. Figure out who is actually producing content that is relevant to your customers — survey your customers if necessary to find out where they get their information. Go through your old contact lists and track down anyone you've lost contact with. And don't just read blogs. Read the comments, follow the links and use analysis tools like Twitalyzer or Traackr to help determine the reach.

Step 4: Influence is not the Holy Grail. It is not some magical metric that will help you measure all of your results. It is not going to get you a raise or a gold star. If defined and used appropriately, then influence can help narrow the amount of chatter that you need to be paying

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attention to and help you focus your outreach efforts. You will still need to measure whether all of that influence resulted in any real outcomes.

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