



Social Media Measurement: A Step-by-Step Approach

Using the AMEC Valid Metrics Framework

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ABSTRACT

Social media measurement can be fairly simple or highly complex depending on one's organizational goals and objectives. But with hundreds of tools, thousands of metrics and all too many self-identified measurement gurus, public relations professionals are struggling through a maze of options, unsure of which really matter. This paper combines a review of some key literature surrounding social media measurement, provides updates on industry standard-setting bodies, and provides an *Eight-Step Social Media Measurement Process* as a place to start. The process utilizes the International Association for the Measurement and Evaluation of Communication's (AMEC; www.amecorg.com) new Valid Metrics Framework (see also Daniels, 2012) and includes a generous Appendix of tools and resources.

INTRODUCTION

Social media has taken over the public relations industry changing forever the way professionals create programs to meet business goals and communications objectives. By now, it is safe to say that most in-house departments or agencies have some type of automated tool to monitor what is being said in social media in a broad sense, with results generated in simple charts or graphs. Others struggle to analyze vast numbers of social citations by hand in an effort to derive deeper insights. However, the majority of PR practitioners (and marketers!) have no real idea of what is working and what is not in their social and digital programs. Take a look at these startling findings from three different surveys:

- Only 22% of 700 survey respondents have a strategy that ties data collection and analysis back to business objectives (Econsultancy, 2012, "Sample").
- Only 28% of 1500 survey respondents struggle to tie analytics back to their campaign strategy, and only 30% are reporting regularly to management. (Alterian, 2011).
- Fifty-seven percent of 622 marketers surveyed by BtoB cited "poorly defined success metrics and key performance indicators" (BtoB, 2012, "On Obstacles to Adoption," para. 1) as among the top three major obstacles to social media marketing adoption.

So, public relations professionals are not alone in the struggle to put meaningful social and digital measurement programs in place. However, senior management in most organizations is now expecting accountability for these programs, so PR industry leaders and academics must move swiftly to help.

Of course, there's been no shortage of ideas on how to measure social media. The market is flooded with books, white papers and articles on a variety of ways to tackle the challenge, with each taking a slightly different tack. According to Olivier Blanchard (2011), President of BrandBuilder (www.brandbuilder.com), there is no "universal right or wrong way to apply social media to an organization's business model" (para. 3). Since every social media program is different, he is correct.

That being said, some key answers are on their way thanks to the development of new standards for both traditional and social media measurement through a cross-industry collaboration of PR trade bodies; social media analytics, advertising and word-of-mouth associations; and blue-chip client companies. This paper will focus on several of these new developments.

But while PR analytics are becoming more clarified, it is important to remember that PR is at its best in the creation of mutually beneficial relationships that become evident over time. True success can't be measured in numbers alone. Environmental scanning, informal research and sense-making are still required.

INDUSTRY RESPONSE TO THE NEED FOR MEASUREMENT STANDARDS

Since 2010, the following efforts have been made to establish standards and guidelines for traditional and social media measurement:

- **The Barcelona Declaration of Measurement Principles** – This declaration of standards and practices to guide the measurement and evaluation of public relations was first adopted at the 2nd European Summit on Measurement in Barcelona, Spain, in June 2010. Leaders of the charge were AMEC, the Institute for Public Relations (IPR; www.instituteforpr.org), PRSA (www.prsa.org), ICCO (www.iccopr.com), the Global Alliance (www.globalalliancepr.org), and David Rockland, Ph.D., Partner/Managing Director at Ketchum (www.ketchum.com). Seven principles were adopted focusing primarily on the setting of measurable goals and objectives, and on the importance of measuring against business outcomes.
- **Valid Metrics Framework for Public Relations Measurement** – a Post-Barcelona Task Force actualized the principles through a framework providing eight different matrices. Each matrix provides metrics suggestions for assessing the three phases of PR – **PR Activity**, **Intermediary Effects** and **Target Audience Effects** -- through the **Communications Funnel**, from awareness through action. The matrices address different kinds of PR programs including product/brand, reputation, crisis, non-profit, issues, education and more. The Task Force was led by Ruth Pestana, former Worldwide Director of Strategic Services of Hill and Knowlton, and Tim Marklein, Practice Leader, Technology & Analytics at W2O Group (www.w2ogroup.com).
- **Coalition for Public Relations Research Standards** – The Institute for Public Relations has brought together leading professional associations—including AMEC, Global Alliance, PRSA and the Council of Public Relations Firms (www.prfirms.org)—to sponsor and coordinate the development of measurement standards. The Coalition has created a “customer panel” of senior communications officers from corporations to ratify, as users, that “this is what a credible standard looks like.” The Coalition has also created an interactive site where opinions can come together in the creation and adoption of the new standards. This group, and site, seeks to set standards in three areas: the Communications Lifecycle, Traditional Media Measurement and Social Media Measurement. The practice is welcome to comment on the site on proposed standards as they emerge (www.instituteforpr.org/researchstandards).
- **The #SMM Standards Conclave**ⁱ - Formed in 2011, the Conclave is the social media working group of the Coalition, and has brought together a wide variety of associations and corporations to establish social media measurement standards in six key areas: Content Sourcing and Methods; Reach and Impressions; Engagement; Influence and Relevancy; Opinion and Advocacy; and Impact and Value (<http://www.smmstandards.org>). Each suggested standard is “open for comments” on the site, with ratification to follow. As of this writing, the first two key standards have been ratified: Content Sourcing and Methods (<http://www.smmstandards.com/category/content-sourcing-methods>), and Engagement (<http://www.smmstandards.com/category/engagement/>). Just some of the players include the IPR, AMEC, PRSA, the Council of PR Firms (www.prfirms.org) and Katie Delahaye Paine (www.kdpaine.com), CMO of News Group International.

Since there is not yet a unified standard in place for measuring social media, this paper will introduce the reader to two processes that should help during the interim period:

- **The AMEC Valid Metrics Framework** – as discussed above with a special focus on the Social/Community Engagement Matrix.

- ***Eight-Step Social Media Measurement Process*** – a process developed by this author to make implementation of the AMEC Valid Metrics Framework simpler, and was based on earlier work done by Katie Paine. This step-by-step guide not only works through the framework, but also provides comments and suggested tools from industry luminaries.

The Eight-Step Social Media Measurement Process

1. Identify organizational and departmental goals.
2. Research stakeholders for each and prioritize.
3. Set specific objectives for each prioritized stakeholder group.
4. Set social media Key Performance Indicators (KPIs) against each stakeholder objective.
5. Choose tools and benchmark (using the AMEC Matrix).
 - Public Relations Activity
 - Intermediary Effects
 - Target Audience Effects
6. Analyze the results and compare to costs.
7. Present to management.
8. Measure continuously and improve performance.

STEP ONE: IDENTIFY ORGANIZATIONAL AND DEPARTMENTAL GOALS

A **goal** is, “a broad idea of what one would like to happen” ... whereas an **objective** is, “a clearly defined statement that includes an *action statement* (a verb), a *timeline* and a *measurable outcome*, according to Drs. Donald Stacks and Shannon Bowen (2011, para. 4, emphasis added). The first step is to identify both organizational and departmental (business-unit) goals that might be affected by a PR or social media campaign. (Step Three will address the setting of specific objectives).

So what are some common goals that a social media program might help achieve? Sally Falkow, CEO of Meritus Media, (www.meritusmedia.com) offered some great ideas during a 2010 private training session:

- **Increasing positive brand awareness and reputation.** (A great example was Dell’s incredible turn-around from “Dell Hell”);
- **Establishing thought leadership.** (Consider Sun Microsystems’ revitalization of its brand through dedicated blogging);
- **Increasing sales.** (Think about Stormhoek Wines reaping a 400% sales increase after sending products to bloggers);
- **Reducing R&D spend.** (Consider the 98% of online respondents who said they’d definitely buy a product they had helped evolve through a process like Dell’s IdeaStorm).

Olivier Blanchard (2011) adds goals like improving customer service (think Comcast), extending digital marketing (think Old Spice and Pepsi) and plugging social media into every department (think GM, Starbucks and Best Buy).

Jim Sterne (2010, p. xxvii) suggests that all organizational goals fit within the three viable categories below. His book, *Social Media Metrics*, is an excellent read on how to measure each of these goals on a very granular basis.

- To raise revenue
- To lower costs
- To increase customer satisfaction

Katie Paine (2010) presented a slightly different structure for organizational or departmental goals in her blog post, *The Social Media Manifesto*:

- Sales or marketing gains
- Increasing engagement
- Improving relationships or reputation

One other goal not mentioned by any of these authors is to increase brand preference and loyalty. Both Sterne's and Paine's directives teach practitioners to keep overarching goals simple and clear, understanding that social media is only one of many channels needed to reach them. Step Two will focus on researching internal and external audiences to further refine goals for key business units.

STEP TWO: RESEARCH STAKEHOLDERS FOR EACH AND PRIORITIZE

Organizations have many departments and stakeholders, and limited budgets with which to reach them. Therefore, once the over-arching goals are identified, it's critical to determine the most important audiences to reach for each targeted department (or business unit). After this step, measurable objectives can be set.

Internal Research – The best place to start is to talk with key players within the organization to ascertain where social media can best contribute to goals in areas such as marketing, sales, customer service, HR and so on. Be sure to identify what PR and social media are accomplishing for them now, and what real success might look like. Write-up the internal research findings and then prepare for external research.

External Research – This process consists of three parts and will take considerable effort, but external research is the single most important step one can take in building an effective foundation. The first step is to create a **Social Graph** to identify where in the social media sphere important stakeholders are involved; steps two and three involve listening to what they are saying.

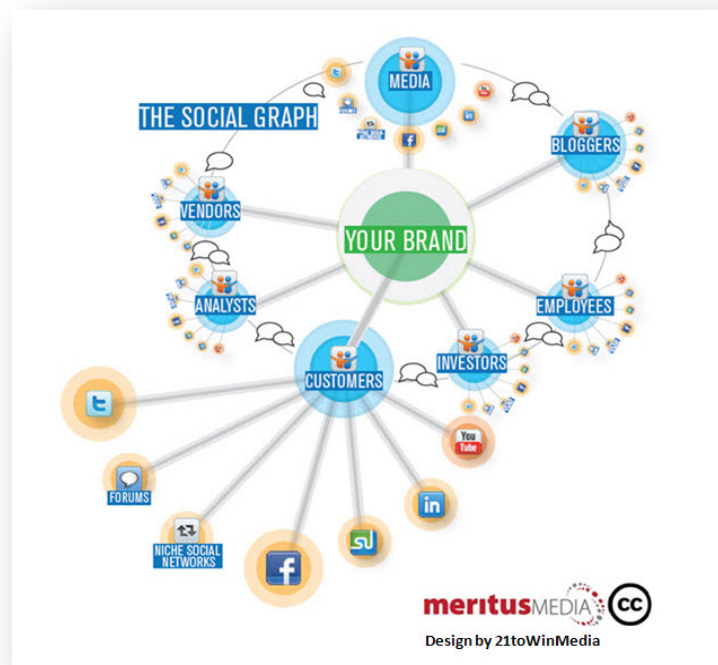
1. Creating a Social Graph – (Finding Key Stakeholders)

Sally Falkow recommends one create a **social graph** for each of the most important departments, brands or services, a process that may take many weeks if it is being done by hand. To do a social graph:

- Take each key stakeholder group that is important to the organization or department and obtain names or email lists of their most important members. Alternatively, do keyword searches to find likely stakeholders and influencers. These groups might include the media, bloggers, customers, employees, vendors, analysts, investors, etc.
- Then, discover where each person is engaged in the social sphere. If necessary, limit the exercise to the most critical groups to the business. One can use an email marketing service like MailChimp (www.mailchimp.com) to get more information about people on an email list. Within MailChimp, plugins like Rapleaf (www.rapleaf.com) can provide detailed demographic information and SocialPro (blog.mailchimp.com/social-pro-connects-your-email-list-to-social-web/) shows where current customers, donors and people on the list participate in social media. Fliptop (www.fliptop.com) is yet another tool that enables a practitioner to add social data to an email list.

- The goal is to determine how best to reach each group and through which social media channels, recognizing that there will be a great deal of overlap.

While this process can be daunting, a number of automated tools and supplier firms can make it easier and are outlined in APPENDIX A.



2. Surveying (Offline Listening to Key Stakeholders)

Falkow also recommends running **surveys** to learn more about stakeholder interests, their opinions about the organization and its competitors, their behaviors and how involved they are in social media. There are many sources for excellent offline (or online) surveys today, several of which have been included in APPENDIX A.

3. Online Listening (Keyword and Message Analysis)

Whether or not a practitioner has the chance to do a survey, a great deal of needed information can be gathered from the conversations gleaned through online listening tools in a **Keyword and Message Analysis**. This analysis can quickly pinpoint what stakeholders are actually saying about the organization and/or the business unit, and their competitors, in terms of recurring themes, complaints, topics and messages.

With the sheer number of artificial intelligence, automated social media analysis tools in today's marketplace, it's relatively easy to set-up Boolean search strings to find keyword and message hotspots. Automated tools are great at picking out clearly-defined information like product or brand names, but at some point, humans are required to analyze the nuance behind what is being said.

Since no one has time to analyze all social citations about a given topic or message, a simple solution is to pull a random sample of citations from each search. Simple sampling techniques have been provided by CARMA International (www.carma.com) in APPENDIX C.

APPENDIX A includes five steps toward conducting a keyword/message analysis, as suggested by Katie Paine (2011, pp. 100-103).

At the end of Step Two, one should have a good sense of the most important stakeholders, where they are active in social media, what they think of the organization/department and their competitors, and how they can be helped. While smaller companies may not have the resources to undertake all of these steps, they are strongly encouraged to select some type of stakeholder identification and listening program since these measures will form the benchmarks for their entire programs.

STEP THREE: SET SPECIFIC OBJECTIVES FOR EACH PRIORITIZED STAKEHOLDER GROUP

At the conclusion of this research, it is time to meet again with key internal managers and together decide which goals and stakeholders will take priority for the PR and/or social media program. Once these choices have been made, a practitioner can move to setting specific objectives for each stakeholder group. Remember that an objective must include **an action statement, a timeline and a measurement outcome** (usually expressed as a % increase).

- If the business unit goal is to increase sales among the 25-54 year old age group, a specific objective might be to increase leads among this target audience by 50% over the next six months.
- Or, if the business unit goal is to increase leads for a new hi-tech product among men 18-24, a specific objective might be to increase share of voice by 20% over the next twelve months.
- If the HR goal is to raise the professional level of employees, a specific objective might be to increase the number of resumes from top college graduates by 15% over the next three months.

Kami Huyse, CEO of Zoetica (www.zoetica.com), talks about using SMART Objectives in social media in the book, *Welcome to the Fifth Estate* (Livingston, 2011) and also in her whitepaper, *A Commonsense Framework to Measure Social Media* (Zoetica Media, 2011). SMART Objectives were first developed by George Doran (1981) and were intended as a powerful management tool. The steps to building SMART Objectives include making them Specific, Measureable, Attainable, Results Oriented and Time Bound.

Once specific, measurable objectives have been set for each key stakeholder group, it is time to build the communications programs and simultaneously select tactical measurements, or **Key Performance Indicators (KPIs)**. It is important to acknowledge that most plans that get to this point will not be solely designed for social media. They will instead encompass tools from both the online AND offline worlds, and may well include tools from paid media and SEO. But, this paper will remain primarily focused on social media.

PART FOUR: SET SOCIAL MEDIA KEY PERFORMANCE INDICATORS AGAINST EACH STAKEHOLDER OBJECTIVE

A major step in measuring social media is to define one's Key Performance Indicators (KPIs). During a 2010 training webinarⁱⁱ, Shel Holtz, principal of Holtz Communication + Technology (www.holtz.com) defined a KPI as a "quantifiable measurement, agreed to beforehand, that reflect the critical success factors of one's effort." Whichever KPIs are selected, they must relate to organizational goals; be relevant to its success, be quantifiable ... and use technical data, which shows progress over time. Some of the examples Holtz gave included:

- “If your goal is to reduce costs, then you would measure the actual cost savings produced by the effort (such as reduced travel costs).”
- “If your objective is to increase inquiries, web traffic and/or recruitment, you might select a percentage increase in traffic and/or the number of click-throughs or downloads as KPIs.”
- “If your objective is to engage the marketplace, you might seek a Conversation Index greater than 8 and a % increase in engagement as KPIs, leading you to use web analytics or content analysis.” (Conversation Index = # of audience comments, replies or shares per post divided by the number of posts). (Author’s note: while the Conversation Index is becoming a popular measure, it is not proof that engagement is actually taking place, so use with caution).

KPIs vary widely depending on the business goals and stakeholder objectives. A few of the popular performance metrics suggested by a Gleanster (2011, pp. 9-10) report that recaps its 2011 survey on Top Performers, include the tracking of:

- The number of data sources and overall volume
- The volume of relevant conversations (to gain a clear sense of who is talking about the brand by age, gender, geography, psychographic and behavior attributes)
- The number of brand advocates and influencers (and those who are engaged) and who is saying what, where and how
- Customer satisfaction and brand advocacy scores like the Net Promoter Scoreⁱⁱⁱ (www.netpromoter.com).

Jim Sterne (2010) cites Erik T. Peterson’s (2006, pp. 7-8) *Big Book of Key Performance Indicators* as the place to go for web KPIs. Peterson provides five critical tips for effective KPIs. In addition, his free online book comes with a set of Excel templates for the creation and tracking of KPIs.

- “Use rates, ratios, percentages, and averages instead of raw numbers”
- “Leverage tachometers and thermometers and stoplights instead of pie charts and bar graphs”
- “Provide temporal context and highlight change instead of presenting tables of data.”
- “Drive business-critical action” ... (i.e. “inspires someone to send an email, pick up the phone or take a quick walk to find help”).

The following paraphrases some KPI guidelines from Paine (2011, pp. 85, 87-88):

- If goals/objectives focus on measuring sales, KPIs might include the % increase in conversion rates, click-throughs to a specific URL, increase in conversations, online donations, membership sign-ups, etc.
- If goals/objectives focus on brand engagement, KPIs might include the ratio of posts to comments; increase in unique visitors; number of returning visitors; number of pages downloaded; number of download requests; sessions lasting longer than five minutes; number arriving from a Google search; subscribers or email addresses left on one’s site; percent recommending the brand, or shouting it out.
- If goals/objectives focus on improving relationships, KPIs need to include surveys to see increased satisfaction, percent improvement in willingness to recommend, increase in trust or satisfaction scores, and percent willing to do business again.

A wonderful visual example (see chart below) of how easy it can be to sketch out specific KPIs once goals and objectives have been established comes from the web analytics guru, Avinash Kaushik (www.kaushik.net), in his Occam’s Razor post, *Digital Marketing and Measurement Model* (Kaushik,

2013). This particular plan, which was centered on a website strategy, addresses goals for a home builder who ultimately wanted to generate sales. Three key objectives were set with the following KPIs:

- Create Awareness – KPI is branded traffic to website at 7,000 visits/month
- Generate Leads – KPIs are email marketing conversions to newsletter subscriptions (45/month) and E-requests for home tours (20/month)
- Highlight Events – KPI is downloads of site event information (150/month)

To set KPI numeric goals, take a look first at historical data. If none exists, take a best guess and adjust as needed after the first months of the campaign.

Global World Domination Inc. "We rock digital!"			
Create Awareness	Generate Leads		Highlight Events
Website Goal: Reinforce Offline/Online Advertising	Website Goal: Capture Leads (Email/Contact)	Website Goal: Provide Homebuyer Info & Resources	Website Goal: Engage Community via Local Events
KPI: Branded Traffic	KPI: Conv. eNews	KPI: # of Downloads	KPI: Visitor Loyalty
Target: 7k Visits/Mo	Target: 45/Mo	Target: 150/Mo	Target: 50% Repeat Visits
	KPI: Conv. Tours		
	Target: 20/Mo		

Table used with permission by Avinash Kaushik

This paper will discuss more about web analytics for measuring various kinds of social media programs since web metrics are concrete and easy to track against goals. Be sure to read Kaushik's (2013) complete article for help getting started with creating a model.

STEP FIVE: CHOOSE TOOLS AND BENCHMARK (Using the AMEC Valid Metrics Framework)

At this point, a practitioner must decide who to measure against, whether it is just his own organization over time, or against competitors. Then, he can coordinate his entire measurement program using the **AMEC Valid Metrics Framework**, which is actualized in eight matrices that have been applied to following types of campaigns: **Brand/Product Marketing, Reputation Building, Issues Advocacy/Support, Employee Engagement, Investor Relations, Crisis/Issues Management, Not-for-Profit and Social/Community Engagement**. The matrices enable the selection of appropriate tools and measures for an organization's KPIs across the campaign with a keen eye toward real business outcomes.

To make the matrices easy to use, the practice of public relations has been broken down into three phases:

- The message or story is created and told
- The story is disseminated via a third party/intermediary, (such as a journalist, influencer or blogger)
- The story is consumed by the target audience, which (hopefully) leads to changes in behavior and business results.^{iv}

These three phases are thus reflected in the **vertical axis** of each matrix as follows:

- **Public Relations Activity** – metrics reflecting efforts in producing and disseminating messages
- **Intermediary Effect** – metrics reflecting third-party dissemination of messages to target audiences
- **Target Audience Effect** – metrics showing the target audience has received the messages and any resulting action-driven outcomes.

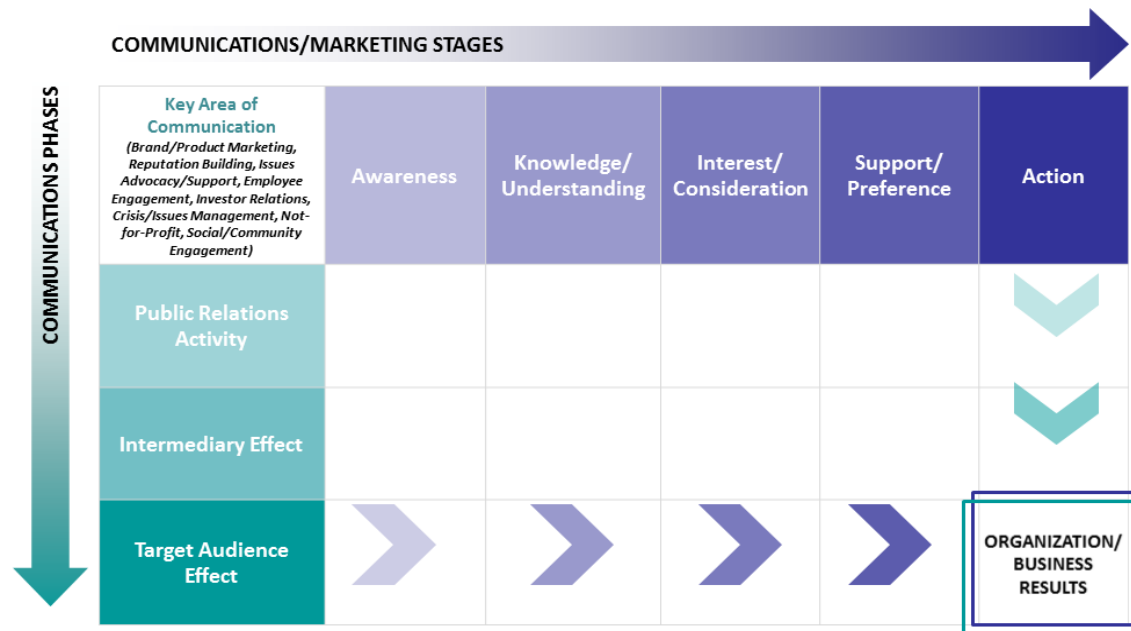
The **horizontal axis** then reflects what is commonly known as the **Communications** or **Marketing Stages** with the five stages listed below:

- **Awareness** – are intermediary and target audiences aware of campaign efforts?
- **Knowledge** – are these audiences becoming clearer about the facts?
- **Interest** – are they giving consideration to an organization's offer?
- **Support** – have they moved toward supporting the offer?
- **Action** – are they taking action in measurable business outcomes?


Within each matrix, suitable metrics have been grouped to help demonstrate a campaign's success vertically (from simple activity to output and outcome results) and horizontally (through the five communications stages). **Bottom line, the goal is to move diagonally across the matrix, from top left to bottom right, to the degree possible.**

Valid Metrics for PR Measurement - *Putting the Principles into Action*
Based on the Barcelona Declaration of Measurement Principles
7 June 2011 (see also endnote iv)

Valid Metrics Framework Template:



From this point forward, this paper will focus upon the AMEC Valid Metrics Framework for ***Social/Community Engagement***, which is shown on the following page with a deep dive into metrics for the three phases – Public Relations Activity, Intermediary Effect and Target Audience Effect. The metrics in this example are not all inclusive, but give a solid foundation upon which to start selecting meaningful ones for each state.

 Social/Community Engagement	Awareness	Knowledge	Interest	Support	Action
	Public Relations Activity <ul style="list-style-type: none"> Content creation (e.g. assets created, videos/podcasts) Social media engagement (e.g. blog posts, blogger events, blogger briefings, Twitter posts, community site posts & events) Influencer engagement Stakeholder engagement Events/speeches 				
	Intermediary Effect <ul style="list-style-type: none"> Impressions/Target audience impressions Earned media site visitors/day % share of conversation Video views Prominence 	<ul style="list-style-type: none"> Key message alignment [traditional & social media] Accuracy of facts % share of conversation 	<ul style="list-style-type: none"> Expressed opinions of interest Social network Followers Retweets/Shares/Linkbacks % share of conversation 	<ul style="list-style-type: none"> Endorsement by journalists or influencers Rankings on industry lists Expressed opinions of support Social network Fans Likes 	
	Target Audience Effect <ul style="list-style-type: none"> Unaided awareness Aided awareness Owned media site visitors per day Social network channel visitors 	<ul style="list-style-type: none"> Knowledge of company/product attributes and features Brand association and differentiation 	<ul style="list-style-type: none"> Relevance of brand (to consumer/customer) Visitors to website Click-thru to site Time spent on site Downloads from site Calls Event/meeting attendance 	<ul style="list-style-type: none"> Attitude uplift Stated intention to buy Brand preference/Loyalty/Trust Endorsement Requests for quote Links to site Trial 	<ul style="list-style-type: none"> Active advocates Brand engagement Leads/sales Revenue Market share Cost savings

NOTE: Within social media, several of these metrics could straddle two rows as an Intermediary Effect and/or Target Audience Effect, depending on who's engaged in the conversation. For simplicity, we have listed those metrics under Intermediary Effect to reflect the general conversation as you would not know if all participants are in your target audience. If the commenters are known to be in your Target Audience, you could reflect those metrics under Target Audience Effect.

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Public Relations Activity

What actual PR activities will be undertaken to build a program? It's critical to keep track of the efforts that are made by monitoring the types of activities the Matrix above suggests, such as:

- Content creation (the number of assets created, videos/podcasts)
- Social media engagement (numbers of blog posts, blogger events, blogger briefings, Twitter posts, community site posts and events)
- Influencer and stakeholder engagement (what activities were undertaken to drive engagement forward, such as the number of Facebook and Twitter posts, community site posts, etc.)
- Events/speeches, offline community events and traditional media outreach

These data points can later be compared to resulting response and business activity, and can even be correlated to business results. However, at this point, they do not measure actual results of the campaign; they simply measure campaign effort.

Intermediary Effects

This is where a practitioner ascertains how the media, bloggers and key influencers (third parties) responded to PR activities across awareness, knowledge, interest and support. Are they

communicating the right messages, in a positive manner, in a greater volume than competitive messages? Have they gone so far as to endorse or recommend? The goal for Intermediary Effects is to get past the simplistic quantitative measures in the awareness column (which are really just proxies for potential awareness), and toward the more sophisticated metrics in interest and support.

There are two basic methods for measuring Intermediary Effects:

- ✓ *Measuring Owned Media Sites* - (websites, Facebook and Twitter pages, for example)
- ✓ *Measuring Non-Owned Sites – or earned media”* (everything else)

One caveat for this section must be mentioned here. It is often very difficult, if not impossible, to determine if the responders to owned and earned media are really intermediary channels or are, in fact, target audience members in social media. AMEC is currently studying this and may issue an update to the framework later in 2013. The measures shared below are effective regardless of whether an intermediary third party, or a target audience member, responded to campaign activities.

- **Measuring “Owned Sites”** – The first step is to benchmark and set measures for each of an organization’s or department’s owned sites, be they websites, blogs, Twitter or Facebook pages, YouTube, etc. Pick and choose the metrics that can best act as KPIs for program objectives and benchmark before the program begins. The following is just an outline, but APPENDIX B includes a full selection of metrics and tools that summarize key advice for:

- ✓ Blogs and Websites
- ✓ Twitter Sites
- ✓ Facebook Sites
- ✓ Bookmarking Sites
- ✓ YouTube, Flickr and Other Image Sites
- ✓ Compound Influence Scores

Track the growth on all the channels mentioned above so one can eventually overlay the scores with PR activities, correlate the two and identify what is working best.

- **Measuring “Non-Owned Site” - Earned Media** – Next, see what Intermediary Effects the media and bloggers are having on the campaign. First, find a good listening platform to bring in as much content as possible. A few free (or nearly free) tools include [Google](#), [SocialMention](#), [Twazzup](#), [HootSuite](#), [BlogPulse](#) and [IceRocket](#). Some great paid tools include [Vocus](#), [Visible Technologies](#), [Sysomos](#), [Dow Jones Insight](#), [Seismic](#), [Alterian SM2](#) and [NM Incite](#).

Once the content is obtained, determine which KPIs work best, such as: share of conversation, key message alignment, accuracy of facts, expressed opinions, endorsements by journalists or influencers, rankings on industry lists –and other metrics that indicate movement from awareness, knowledge, interest and support – which will stimulate the target audience to act.

Two key methods for measuring earned media include the following, which are presented in detail in APPENDIX C:

- ✓ Content Analysis – for qualitative evaluation of what is being said
- ✓ Source Strength – for quantitative evaluation of earned-media sites

Pulling metrics, regardless of how many are chosen, can take hours of work each week, especially if a number of free tools are used. It's best to find a paid tool that fits campaign objectives.

Some great tips for choosing a paid data supplier is found in the *PRSA Tactics* article, *Deliverable Objectives: Considerations for Creating Measurement Plans*, by Pauline Draper-Watts, EVP of EdelmanBerland (www.edelmanberland.com) and Jackie Matthews, Communications Research for GM (www.linkedin.com/pub/jackie-matthews/6/148/875) (Draper-Watts & Matthews, 2011).

- ✓ Ask potential providers whether or not they supplement aggregated data feeds with their own web-crawler, and if so, how deep it goes into sites?
- ✓ Does the crawler reach the home page only, or can it penetrate down to the specific URL level?
- ✓ What kind of data cleaning will be done?
- ✓ How much storage will one receive, how far back does it go and how easy will it be for one to access the data?
- ✓ Make sure to understand as much as possible about the measurement formulas and weightings used by the tool, recognizing that no formula will be perfect (and many are proprietary).
- ✓ Finally, check references, account team and pricing.

Target Audience Effects

This is the most exciting section of the AMEC Framework, where it pairs Public Relations Activity and Intermediary Effects with Target Audience Effects. It's good to recognize that many Intermediary activities may, in fact, be the end goal for some programs. But for most, it is critical to link efforts through all the stages to real business outcomes.

Outcomes can be hard or soft, ranging from leads or sales increases and efficiency savings to brand awareness, customer loyalty and customer service success. There are many ways to measure this final step, which are presented in depth in APPENDIX D and include:

- Surveys
- Statistics
- Web Analytics
 - ✓ For Non-E-commerce Sites:
 - ✓ For E-commerce sites
- Measuring Across Silos

STEP SIX: ANALYZE THE RESULTS AND COMPARE TO COSTS

A major problem public relations practitioners face when trying to pull measurement results together were summarized in a *PR News* (www.prnewsonline.com) article, *Avoiding Measurement Blind Spots* by Margot Sinclair Savell (2010), Senior Vice President Global Measurement at Hill+Knowlton Strategies (www.hkstrategies.com). She wrote:

Because of the large volume of social media conversations, people frequently want to provide quantitative metrics only, without looking behind the numbers to determine trends, successes and missed opportunities. They create beautiful spreadsheets that show month-over-month or quarter-over-quarter changes, along with charts to visually demonstrate the data. But data does not equal intelligence. Analyzing the data brings actionable insights and recommendations that can be used to revise future strategy. (para. 5)

Sinclair Savell is right. Taking the deep dive to glean insights and make course correction is the real reason for measurement in the first place. One must go back and look for the articles and citations underlying spikes and valleys in online and offline coverage. What could have been done differently during those periods? What are the competition's weaknesses? Where could more target audience members have been grabbed? If this type of analysis isn't a practitioner's strength, consider outsourcing it to a firm that specializes in social media analysis.

In addition to analyzing the data for insights, it is critical to compare program costs against identified results. However, most PR results are not financial in nature, so using Return on Investment (ROI) can be tricky. Recent discussions on the topic of ROI led to a spirited debate following the 2012 International PR Research Conference, "[ROI – The Miami Debate](#)" that was led by [Prof. Tom Watson](#) (Bournemouth University), [Prof. Ansgar Zerfass](#) (Leipzig University) and [Mark Weiner](#), CEO of Prime Research. A report and audio recordings of this debate can be found at <http://www.instituteforpr.org/2012/07/roi-%E2%80%93-the-miami-debate/>.

Among several opinions included in the pending interim standard is that of Fraser Likely, President of Likely Communication Strategies Ltd. (www.instituteforpr.org/bio/fraser-likely). Likely contends that "ROI is a financial measure that should only be used in cases where both the money invested (the "I" of ROI) and the money earned or saved (the "R" of ROI) can both be measured in financial terms. ROI should not be used when referring to results of non-financial measures." He further contends that ROI can really only be measured at the organizational level, not at the campaign level.^v However, not everyone agrees. At this time of writing, the interim standard for ROI (currently under development) suggests the following, as penned by Tim Marklein of W2O Group (www.w2ogroup.com):

- ROI should be calculated using the standard financial accounting formula (see below).
- There is some debate about whether ROI can be calculated on a program, which would be treated as an expense in accounting, or should be restricted to the organization overall.
- The term "Results" does not equal "ROI." We need to use additional measures such as "total value," as advocated by all authors cited in the document.

$$\text{ROI} = \frac{\text{(Total \$ Earned, Saved or Avoided)} - \text{MINUS (Total \$ Invested)}}{\text{(Total \$ Invested)}} \times 100\%$$

The interim standard does allow for the idea that programs that directly tie to sales could possibly use the ROI formula. However, for non-sales programs, there are other forms of financial accountability such as the CFA – "cost-effectiveness analysis." Katie Paine (2011) includes more than a dozen great ideas for cost effectiveness comparisons in her book. Here are a few:

- Factor in the cost-per-click or cost-per-lead to help judge the efficiency of different programs.
- Pull sales data from web analytics and CRM systems and compare against costs.
- Look at cost savings in areas like customer service and recruitment.
- Look at paid vs. earned search rankings; if earned search is doing well, it may be possible to decrease paid.
- Look at cost avoidance in a crisis situation. What could it have cost if one's campaign hadn't calmed things down?
- Look at one's social capital. Studies have shown that the more relationships one has, the better. Social capital can be measured by looking at data like customer and employee turnover, legal costs and productivity scores.

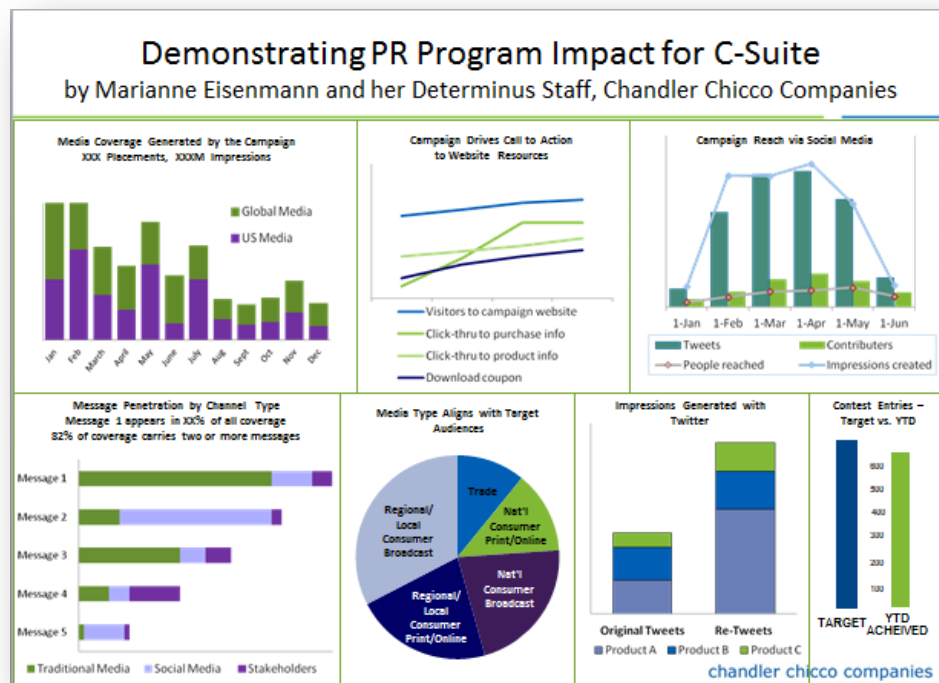
PART SEVEN: PRESENTING TO THE CEO

Up to now, this paper has focused almost entirely on how a PR practitioner can apply data and metrics to the results of public relations campaigns. However, before planning a CEO presentation, Prof. Tom Watson (Bournemouth University) cautions that PR activity can't always be reduced to numbers any more than personal and organizational relationships can be. In fact, Watson advises that top communicators use between four and eight measures, of which half are informal. The informal measures often provide the insight, particularly in understanding the attitudes and motives of hard-to-reach audiences.

So how does one pull everything together for the CEO and other senior management without presenting a virtual "thud" of metrics and information? In her article, *Communicating Results to the C-Suite*, Marianne Eisenmann (2011) of the Chandler Chicco Companies (www.chandlerchicco.com) recommends finding out how management likes to receive data, and identify in advance the questions they might have. If other departments are reporting regularly, the PR department should format its report in the same way.

A campaign results story should be told as quickly as possible. The best way is to create a dashboard or scorecard with headlines, bullets and metrics that show trending. Make sure to show how key messages and other variables might have impacted business goals. For instance, did a particular media event drive website visits? Did a particular story link to donations? However, as per Watson, add informal data to highlight especially meaningful conversations, successful blogger outreach, or other anecdotal comments to put everything in context.

Most important, if survey results, correlations to outcomes, or solid tracking data from web analytics exists, be sure to include those results in the summary dashboard as it will resonate best with a CEO.



STEP EIGHT: MEASURE CONTINUOUSLY AND IMPROVE PERFORMANCE

Measurement should only happen once if one has a one-time event or program. Otherwise, measurement must be ongoing so better benchmarks and goals can be set, and programs refined, over time. Jim Sterne (2010) defines a “healthy community” as one that is:

- Growing
- Useful (# of posts and page views)
- Popular (traffic and page views)
- Responsive
- Interactive (thread depth, average number of posts in threads and the number of unique contributors)
- Lively (number of posts and distribution)

Without measuring regularly, a practitioner would not know whether or not his community, or any PR program, was “healthy.” To stay on track, set a regular schedule for deep analysis and presentations to management.

The remainder of this paper provides deep resources for all phases of the AMEC Framework discussed throughout this paper. Keep in mind that social media analysis methods change at light speed, so be ever-vigilant to seek out new thinking, standards and resources. Good luck!

#

APPENDIX A

RESEARCH STAKEHOLDERS AND PRIORITIZE

Creating a Social Graph -

- [Ecairn](http://www.ecairn.com) (www.ecairn.com) a paid tool that will find communities based on keyword searches, rank the influencers, and organize communities based on campaign objectives. It can map conversations and show progress as engagement grows. Well worth reviewing.
- [Fliptop](http://www.fliptop.com) (www.fliptop.com) – an amazing dashboard that accepts email lists or social identifiers (i.e. a twitter handle) and provides each stakeholder's social profile. The system returns names, age range, gender, location, employer, occupation, influence score, and all the key networks on which the individuals are engaged. As of this writing, the tool locates 25-50% of people searched. Results can also be integrated into other dashboards via an API.
- [Row Feeder](http://www.rowfeeder.com) by Simply Measured (www.rowfeeder.com) – a great search system that will track keywords, hash-tags or usernames from Twitter or Facebook and deliver the statistics in Excel.
- [Traackr](http://www.traackr.com) (www.traackr.com) – will identify influencers based on keyword searches, and more importantly, by industry type. It provides reach, resonance and relevance by topic, delivering key lists and full influencer profiles. Traackr products range from enterprise to small business and has gained a strong following among sophisticated social media analysts.
- [WeFollow](http://www.wefollow.com) (www.wefollow.com) – This free site started as a Twitter directory in 2009 and has since grown to a community of over 1.3 million users. Each member can be identified by special interests and sorted by the Wefollow Prominence Score. This ranking system (while not perfect) allows the user to quickly discover, follow and learn from the most prominent people around the world ... and add them to a social graph for free.

Surveying Audiences -

- There are hundreds, if not thousands, of primary research firms that provide excellent internal and external in-depth interviews (one-on-one, dyads, focus groups and full surveys). A few are listed below that may be helpful:
 - ✓ [Forrest W. Anderson Consulting](http://forrestwanderson.com) (forrestwanderson.com) - former research director for GolinHarris, Burson-Marsteller and Text 100, and member of the IPR Measurement Commission) -- custom research of any kind with full understanding of the needs of PR.
 - ✓ [ORC International](http://www.orcinternational.com) (www.orcinternational.com) (formerly Opinion Research Corporation) – has a great omnibus survey practice as well as custom research capabilities.
 - ✓ [Koski Research](http://www.koskiresearch.com) (www.koskiresearch.com) – specializes in brand/reputation assessment, opinion research and message testing, as well as other services.
 - ✓ [C+R Research](http://www.crrresearch.com) (www.crrresearch.com) – full service research provider.
 - ✓ [GfK](http://www.gfk.com) (www.gfk.com) – full-service international research firm.
- [Forrester](http://www.forrester.com) (www.forrester.com) - Forrester provides proprietary research, consumer and business data and custom consulting to help one understand the level of social sophistication among consumers in a given industry. [Forrester's Social Technographics](#) data classifies consumers into [seven overlapping levels of social technology participation](#), which are: Inactives, Spectators, Joiners, Collectors, Critics, Creators and Consumers. If consumers are Inactive in social media, then offline PR campaigns are needed. If they are highly active – depending, of course, on other demographic and age parameters – they can best be reached through creative online campaigns that are interactive and have the potential for virality. For Forrester's free tool:

http://empowered.forrester.com/tool_consumer.html to enable users to get a high-level snapshot of the social technology behaviors of their broad targets. To obtain deeper profiles, [Forrester Research's Consumer Technographics® data](#) covers hundreds of brands, consumer attitudes, and behaviors globally and can be purchased on their website or through their sales department.

SOCIAL TECHNOLOGY PROFILE TOOL
 Profile your customers' social computing behaviors. Select age, country, and gender from the dropdowns above. The tool will automatically create a profile for your selected demographic group.

BUILD PROFILE NOW ►

Consumer (All adults = 100)

Segment	Value
Creators	0
Critics	0
Collectors	0
Joiners	0
Spectators	0
Inactives	0

Help About Forrester

Source: Forrester Research's Consumer Technographics data.
 Part of Forrester's [Groundswell](#) content.
 Copyright 2009 Forrester Research



- [iPerceptions \(www.iperceptions.com\)](http://www.iperceptions.com) – a research firm with innovative website surveys including the award-winning free **4Q website tool**. The 4Q, which is highly recommended by Avinash Kaushik, allows business owners to evaluate the online experience, measure customer satisfaction and quickly implement website improvements based on real visitor feedback.
- [SurveyMonkey](#) – for those without large survey budgets, the web is full of great DIY surveys that can be sent to smaller stakeholder groups. Again, the key question is to determine how engaged the stakeholder groups are in social media along with their interests, demographics, preferred social platforms, etc. This paper will explore the identification of influencers in more depth later in this paper, but for now, simply look for ways to segment target publics to the degree possible.

Continued on next page

APPENDIX A
RESEARCH STAKEHOLDERS AND PRIORITIZE
Continued

Keyword and Message Analysis – (Summarized from *Measuring What Matters*)

- Identify what keyword phrases people are using to find an organization's site through web analytics tools such as [Google Analytics](http://www.google.com/analytics) (www.google.com/analytics) and through keyword tools such as [Google AdWords](http://www.accounts.google.com) (www.accounts.google.com) or [Wordtracker.com](http://www.wordtracker.com) (www.wordtracker.com).
- Set-up search strings in Google Alerts or a paid tool using these phrases, and refine to pull up the most relevant results. These searches can be delivered via email or subscription to Google Reader or other RSS feed readers.
- Set-up an Excel spreadsheet to track posts and articles using these phrases as they come in. In each column, list: *Date, Source, Author* and *Subject*, and also note if there are *Comments, Links, Trackbacks* or *Retweets*.
- Finally, figure out which sources matter most.
- Figure out how the organization and its competitors are seen. This information will be very important for benchmarking purposes.

Paid tools like [Vocus](http://www.vocus.com) (www.vocus.com), [Radian6](http://www.radian6.com) (www.radian6.com); [Alterian SM2](http://www.alterian.com) (www.alterian.com) and [Sysomos](http://www.sysomos.com) Heartbeat and Map (www.sysomos.com) are great for specific keyword searches, tracking conversations, rating them with key metrics and sentiment, and outputting results to a spreadsheet for further analysis. These tools can greatly shorten the time required for these tasks compared to using free tools like [Google Alerts](http://www.google.com/alerts) (www.google.com/alerts), [Social Mention](http://www.socialmention.com) (www.socialmention.com), [IceRocket](http://www.icerocket.com) (www.icerocket.com) or [Addict-o-matic](http://addictomatic.com) (http://addictomatic.com).

[Attensity](http://www.attensity.com) (www.attensity.com), a leader in customer experience management, reminds users to also check bookmarking sites and structured review pages to find out what stakeholders are searching for, and what their opinions might be. Important sites include [Digg](http://www.digg.com) (www.digg.com), [Reddit](http://www.reddit.com) (www.reddit.com), [Stumbleupon](http://www.stumbleupon.com) (www.stumbleupon.com), [Bazaarvoice](http://www.bazaarvoice.com) (www.bazaarvoice.com) and [Yelp](http://www.yelp.com) (www.yelp.com).

APPENDIX B

MEASURING OWNED SITES

The metrics and suggestions that follow are recommended for measuring owned channels, and summarize advice from Jim Sterne, Avinash Kaushik, Katie Paine, Sally Falkow, Kami Huyse, this author, and others.

1. Blogs and Websites

- Visitors, Unique Visitors and Visits – Benchmarking these simple numbers for owned sites is important for gauging awareness as intermediaries and target audiences move across the funnel. They can be found in [Google Analytics](http://www.google.com/analytics) (<http://www.google.com/analytics>), which is free, or in other paid tools.

Google has recently expanded its offerings through [NextAnalytics for Excel](http://www.nextanalytics.com) (www.nextanalytics.com), which offers hundreds of charts aggregating one's website, Facebook page, Twitter page, LinkedIn, YouTube and other data feeds. The software packages range from \$299/year to \$995/year and deliver data into Excel spreadsheets, charts or graphs. NextAnalytics is definitely worth checking out.

Web analytics tracks movement from basic exposure/awareness through all the steps of the AMEC Valid Metrics Framework, and can complete the picture with conversions to sales, memberships, page downloads, and dozens of other metrics. To identify Intermediary Activity, look at referral sites to see which media sources, blogs or influencers are sending traffic.

- Comments – Counting comments is also important for gauging awareness; but, to measure further across the Framework, consider using the Conversation Index, which measures the # of Audience Comments or Replies per Post (divided by the total posts or activity). If an individual is posting more often than he is receiving comments, he is in a broadcasting stage and his audience is not progressing through the stages. To calculate this score on the post, read *Measuring the Online Conversation*, by Kami Huyse (2006).
- Site and Search Rankings and Authority – Where does an organization's site show up in a [Google Search](http://www.google.com) (www.google.com)? How does it show up in [Alexa](http://www.alexa.com) (www.alexa.com), [Compete](http://www.compete.com/us/) (<http://www.compete.com/us/>) or [Quantcast](http://www.quantcast.com) (www.quantcast.com) Rankings? What about inbound links? Or Google PageRank? Is all this information available from a single free site? Yes – [WMTips.com](http://www.wmtips.com) (www.wmtips.com) provides it in the [Site Information Tool](http://www.wmtips.com/tools/info/) (<http://www.wmtips.com/tools/info/>). This site also provides a great list of the top keywords. Again, all are great metrics to benchmark before a program begins and track along the way.
- RSS Subscribers – To determine how many subscribers a blog has to its RSS feed, head to Google Reader and search for the blog name. It will bring back a list of results that include the number of people who have subscribed to that blog in Google Reader. This is usually only a fraction of the actual subscribers, but it is helpful as a benchmark that can be used to gauge progress over time. For owned sites, an accurate count can be determined through a paid service like Feedblitz (<http://www.feedblitz.com>) or a free service like [Google's Feedburner](http://www.google.com/feedburner).
- Linkbacks – How many people have clicked-through on blog posts or Twitter links? To find out, make sure to use a URL-shortening site like [Bit.ly](http://www.bit.ly) (www.bit.ly), which tracks the number of clicks on the link. [Hootsuite](http://www.hootsuite.com) (www.hootsuite.com) also provides link tracking as one of its free report options. Jim Sterne (2010) advises coding each link by a unique code that identifies the campaign. To do this, simply add a "?" mark to the end of each link followed by a campaign identifier. Then, when they are re-tweeted, they can be tracked. Kami Huyse (2010) has a nice tutorial about how to do this using Google's URL Builder tool. In case a campaign is already in progress, and posts did not use Bit.ly links, it is still possible to get some idea of how many people linked to those posts by going to Google and entering "link:URL." This method usually undercounts links, but it is a start. Also see [Open Site Explorer](http://www.seomoz.com) by SEOmoz (www.seomoz.com).

APPENDIX B
MEASURING OWNED SITES
Continued

2. Twitter Sites

Management tools like [Sprinklr](http://www.sprinklr.com) (www.sprinklr.com), [SproutSocial](http://www.sproutsocial.com) (www.sproutsocial.com), Hootsuite (<http://hootsuite.com>), [Spredfast](http://www.spredfast.com) (www.spredfast.com) and others can help to manage a Twitter account more effectively. Both Hootsuite and Spredfast have a fairly robust set of analytics tools built in, including integration with Google Analytics. Cost and access to account authentication will be the main challenges with these tools. Other tools like Rowfeeder and the free Social Mention can gather data on hashtag or descriptive keywords without access to the account. Here are a few metrics to watch:

- Number of Followers – count number of followers at the outset of a program to establish potential awareness, and watch over time to see if this number increases, and more importantly, if it increases with the right types of followers. It's important to look at the ratio of followees to followers with the goal of having more of the former. Some helpful tools (albeit controversial) for vetting followers to spot Intermediary influencers include: [Klout](http://www.klout.com) (www.klout.com), [PeerIndex](http://www.peerindex.com) (www.peerindex.com), [SocialMention](http://www.socialmention.com), [TweetLevel](http://tweetlevel.edelman.com/) (<http://tweetlevel.edelman.com/>) and [Twitalyzer](http://www.twitalyzer.com) (www.twitalyzer.com).
- Retweets - are campaign tweets being passed along by influential people? Again, check some of the tools in APPENDIX A to identify potential influencers, and also take a look at the free tool [Retweetrank](http://www.retweetrank.com), www.retweetrank.com, to benchmark and track retweet success.
- Retweet Velocity – how likely is one's tweets to be retweeted, and how quickly will the message spread and resonate with an organization's audience. Keep an eye out to see if the same people are retweeting over and over, or if new people are passing the messages on. Check free or paid tools to see if it offers a Retweet Velocity score.
- Retweet Efficiency – how many retweets does a practitioner get per 100 followers?
- @Replies – how many messages is received per outbound message? Is a practitioner being added to lists and building an audience?
- Conversation Index on @Replies – how many @replies does one send versus receive per day? Is he broadcasting or participating? To get this index, divide the number of replies by how many tweets have been sent out. The goal is to beat 1.0.

Don't forget to watch for Twitter drop-outs via a system like [GraphEdge](http://www.graphedge.com), which identifies legitimate followers versus bots, followers and unfollowers, the churn rate and even "unique names" in second level networks. It is also possible to determine how many of followers are fake at [SocialBakers.com](http://www.socialbakers.com) <http://www.socialbakers.com/twitter>.

3. Facebook Sites

Facebook has a robust measurement system built in with Insights; however, it only stores data for a rolling month, so if other data is needed – such as top fans and benchmarking against older data – an external tool is needed. Sysomos (www.sysomos.com) and [PageLever](http://www.pagelever.com) (www.pagelever.com) are great for more in-depth analysis. Tools like [Quintly](http://www.quintly.com) (www.quintly.com) are good for benchmarking and measuring between a client page and competitor pages. A general note: When it comes to Facebook, EdgeRank (www.edgerank.com) is a critical component of whether or not content will be seen. The following are some metrics to consider:

- Number of Fans or Friends and Active Users – benchmark the number of fans, friends and active users

at the beginning of the campaign, and watch to see if the number grows with influential members of the media, bloggers, Tweeters, etc. Refer to APPENDIX A for tools to measure influencers.

- Number of Comments – how many comments does the campaign receive in a given amount of time? What is the Conversation Rate – the percentage of feedback one receives compared to one's postings?
- Number of Likes – is this number growing?

All of these basic metrics can be found for free for company pages right in [Facebook](https://www.facebook.com) (www.facebook.com) on the Insights page (if the site is large enough to qualify), and even more metrics are available as discussed above.

4. Bookmarking Sites

- Are influencers "going public" with an organization's information by tagging links or posts to social bookmarking sites such as [Stumbleupon](http://www.stumbleupon.com) (www.stumbleupon.com) or [Reddit](http://www.reddit.com) (www.reddit.com)?
- Are they rating the products on review sites such as [Bazaarvoice](http://www.bazaarvoice.com) (www.bazaarvoice.com)? Be sure to benchmark before launching a program.
- How are influencers categorizing the organization's site? Reviewing this information will affect how an organization's SEO should be set-up. Look at how people are bookmarking critical sites in Delicious by searching for its URL (delicious.com).

5. YouTube, Flickr and other Image Sites

- For Video – [YouTube](http://www.youtube.com/analytics) (www.youtube.com/analytics) is a powerful cultural tool to identify the next viral video hit. It also has a powerful analytics suite, called Insights, which provides number of views, unique users and subscribers; links followed to the video; geography and demographics; and engagement through sharing, ratings, comments and favorites – all for free. Another great resource is OneLoad (<http://www.oneload.com/>), which provides tracking and analytics of video content on multiple platforms in one place.
- For Photos – [Flickr's analytics tool](http://www.flickr.com) (www.flickr.com) provides a variety of metrics including the number of views per photo, and how referrers found them, among the stats available through its subscription option.
- For Social Photos – Instagram (instagram.com) has taken off in popularity to share photos with a community of friends. Owned by Facebook, this site allows seamless posting to a number of social networks, including Twitter and Facebook. Third-party services, such as Statigram (<http://statigr.am>) provides important stats for owned accounts, including the number of likes and comments.
- For Visual Sharing – Pinterest (<http://pinterest.com/>) is one of the most explosive new social networks. It allows the aggregation of content in a visual format. The third-party tool Reachli (<http://www.reachli.com>) allows one to load a "pin" to Pinterest and then track its viral spread.

6. Compound Influence Scores

There has been terrific debate about the various Compound Influence Scores available through free and paid tools. One major problem is that most are not transparent, so their value is in question. Another problem is some of the most popular ones, like [Klout](http://www.klout.com) (www.klout.com), don't factor areas of interest into their influence scores. Having said this, while none of the scores below are even remotely the Holy Grail, they can be helpful in gaining some sense of progress toward establishing a practitioner's online influence, as well determining some of the potential influence of his targets.

- [Klout](#) - measures influence based on a person's ability to drive action. Every time one creates content or engages in conversation, he has the potential to influence others. The Klout Score, a number between one and 100, is a representation of one's overall social media influence. Klout pulls in data from twelve social networks, such as Twitter, Facebook, LinkedIn, YouTube, Google+ and so on. The science behind the score examines more than 400 variables on multiple social networks beyond just the number of followers and friends. It looks at who is engaging with a particular content and who they are sharing it with. Klout is an imperfect score since it does not take into account topics or areas of influence, though it does list endorsements on topics. Unfortunately, these stats are easily gamed.
- [PeerIndex](http://www.peerindex.com) (www.peerindex.com) – like Klout, PeerIndex provides a 0-100 composite score that is meant to measure online authority. It reflects the impact of a person's online activities, and the extent to which he has built up social and reputational capital on the web. PeerIndex goes beyond popularity and looks at one's authority on a category by category level using eight benchmark topics. It also determines whether or not his audience is listening and receptive. Finally, an activity score is included since that will determine the share of attention received. Data is pulled from Facebook, Twitter, [LinkedIn](http://www.linkedin.com) (www.linkedin.com), [Quora](http://www.quora.com) (www.quora.com) and an owned blog. The site provides great information regarding who is retweeting and replying most often.
- [SocialMention](#) – this composite score is based on social media citations in 80+ social media properties. It is based on: Strength (the likelihood one's brand is being discussed); Sentiment (the ratio of positive to negative); Passion (the likelihood that those talking about one's brand will do so repeatedly); and Reach (the number of unique authors divided by the total mentions).
- [TweetLevel](#) – This free tool is a project developed by Jonny Bentwood (@JonnyBentwood) from Edelman. TweetLevel (<http://tweetlevel.edelman.com>) measures influence, popularity, engagement, and trust on Twitter and gives a score for each area, as well as an overall score. It also looks at what factors make up engagement, demand and reach for a given user and gives them a category to determine what kind of Twitter user they are: Idea Starters, Amplifiers, Curators, Commentators or Reviewers.

APPENDIX C

MEASURING EARNED MEDIA (NON-OWNED SITES)

1. Content Analysis

Using keyword searches in automated monitoring and analysis systems, organizations can establish where they and their competitors stand in terms of impressions, reach, computer-generated sentiment, general messaging and topics. This exercise will provide an organization with the ‘big picture’ and some directional information, as well as its share of conversation. However, be aware that computer processing of sentiment and messaging is only about 70% accurate, according to Forrester. Thus, it is critical to dig deeper by doing a Content Analysis with human analysts on at least a sample of the coverage – which will be discussed next.

During a 2012 PRSA/AMEC Measurement Workshop, this author presented advice from Chris Scully, Vice President Research Director of CARMA International (www.carma.com), for how to create a good sample of clips for human analysis:

- Sampling Techniques Include:
 - ✓ Use a *targeted list* of outlets/users (*a key media list*)
 - ✓ Use outlets/users that meet *other key criteria* (*Influencer scores, geographies, etc.*)
 - ✓ Use the *whole traditional or social media universe*
- Ensure that your Sample is Random and Large Enough:
 - ✓ Take every *Nth* article from your *designated article universe* so you get 500 to – 1,000 citations, which is typically sufficient.
 - ✓ Or, get a free “sample-size calculator,” which can determine your minimums to get a margin of error of less than +/- 5 percent, with a 95% degree of confidence. Just search Google for such calculators, such as [this one](#) from Creative Research Systems.

Once you’ve got a good sample, score each citation by hand for variables such as:

- Topic/Category
- Dominance (how much of the story did the organization own?)
- Prominence (how high up in the story was it featured?)
- Sentiment
- Key messages
- Quotes
- Positioning on key issues

It is possible to do this work in Excel, using each row for a media placement and each column for a variable. After running a Content Analysis, and if competitive coverage was included, one can determine where the organization stands in regards to its competitors and against topics and issues as a whole. Refer to Paine (2011) for additional information on how to do a Content Analysis.

Many monitoring and analysis systems are on the market today to simplify this task – especially those that are supported by human analysis teams. [CARMA International](http://www.carma.com) (www.carma.com), Cision (www.cision.com) and [Salience Research](http://www.newsgroupholding.com) (www.newsgroupholding.com) are three that offer automated tools and professional services to provide automated big picture as well as accurate sample analysis.

Bottom line – benchmark and continue to measure against KPI goals such as key message penetration, quality of coverage, and how the organization stacks up to its competition. Watch especially for endorsements, rankings and expressed opinions in the coverage as those imply interest and support, which often lead to Target Audience Effects.

APPENDIX C
MEASURING EARNED MEDIA (NON-OWNED SITES)
Continued

2. Source Strength

Now let's look at whether or not the media and bloggers are helping move an audience along the communications phases by gauging their reach, strength and actions. An important influencer may not have the largest audience, but may have the right audience to do what is needed.

There are many ways to measure the influence of earned media sites, and if a Social Graph has been done, an organization's status with many key influencers will already have been benchmarked at the beginning of the program. As the program matures, more sites will have been added and must be quantified for their value to program goals.

- Opportunities-to-See (OTS) (Impressions) – While this metric is far from exact, it can be a useful starting point. Few data vendors measure down to the URL level, so practitioners can end up with inflated numbers from main site pages. Nielsen, comScore, Compete and Alexa all generate very different numbers, so the results will likely have major gaps and questionable validity. Nevertheless, OTS is an easily obtained number from most monitoring platforms.
- Reach – This is a derivation from OTS that attempts to correct some of the inflation, and will usually be a proprietary metric from a data provider.
- Traffic – For influencers' blogs, traffic can be counted by subscribers and likes; for their Twitter pages, it is counted by followers; for Facebook, it is counted by fans and friends. For influencer websites, it is counted by unique visitors, page views or RSS subscribers. Check www.wmtips.com Site Information Tool for influencer Google page rankings, [Alexa](#) rankings, and other traffic-related scores.
- Authority and Impact – Check the influencers' [PeerIndex](#), [Twitalyzer](#), TweetLevel or [Klout](#) scores. Backlinks are another way to see if other sites are referring to a particular blog. Use SEOmoz free Open Site Explorer tool (<http://www.opensiteexplorer.org/>) to check for backlinks and other relevant activity, such as Facebook Likes, Twitter Shares and Google Plus One shares. Rather than targeting the highest-authority sites for outreach, target those that are NOT the highest, since the others often receive between 500-1000 product pitches a day! Instead, look at the "magic middle" of the "long tail" where more moderate sites fit a niche, and are more personal and influential.
- Inbound links – Does the influencer site have contextual links from well-ranked sites and blogs?
- Reader Engagement – Does the site seem to get a lot of comments? Do people spend time there?
- Recommendations – Does the influencer actively retweet, bookmark, tag and share content? Has he recommended any of the organization's products or services? Has any inbound traffic from his site come to the organization's owned sites?
- Connections – How many followers or mutual connections do they have?
- Track Record – How long have they been around? How many blog posts have they written?
- Conversion Rate for Referring Sites – Does their site tend to draw visitors who take action once they reach one's site in the form of information downloads, registration, or sales? This paper will discuss tracking such "conversions" through web analytics in APPENDIX D.

Finally, mix and match free tools to cross-verify results. Do not rely on just one source.

APPENDIX D

MEASURING TARGET AUDIENCE EFFECTS

1. Surveys

Surveys aren't new, but survey methods have been updated for today's technologically-savvy online world. The best way to determine if one's target audience is truly aware, knowledgeable, interested and/or supportive of an organization's brand or message, especially in relationship to its competitors, is to do an aided- and unaided-awareness survey before and after the campaign.

If a practitioner happened to do a *Social Graph* as outlined in APPENDIX A of this paper, then this would be the time to conduct a new post Social Graph, to see if sentiment and engagement have changed. Be sure to look back to that section for ideas on which tools to use.

Identifying any type of change along the communications phases as the result of a social media campaign is an excellent barometer of success. As mentioned earlier, this can be done with free tools such as [SurveyMonkey](#), or with help from any number of great research companies. Just Google "survey research," or look at APPENDIX A, to find a variety of options from which to choose.

Don't forget how easy it can be to survey an audience by embedding a task completion-rate survey on an organization's website that pops up as people exit. The survey asks if a website or blog has enabled the visitor to complete the task he/she came to do on the site, and if not, why not. Once again, Avinash Kaushik (2008) recommends the free [iPerceptions 4Q](#) in his blog post, "4Q – The Best Online Survey For A Website, Yours Free!" More robust paid services, like ForeSee (<http://foreseeresults.com/>), are also available.

2. Statistics

Another way to link Public Relations Activity and Intermediary Effect to Target Audience Effect is through market mix models, Correlation Coefficients (see below) and other statistical models.

If one has a market mix model, provide the program's KPIs to the modeler to determine whether there is a causal relationship between those metrics and business objectives. Market mix models are extremely sophisticated and study all parts of a marketing program to determine cause and effect. They are also very expensive, and social media reach numbers may not be high enough to register amidst all the other marketing metrics. For more information, see *Representing PR in the Marketing Mix: A Study on PR Variables in Marketing Mix Modeling*, an IPR white paper written by Brian G. Smith (2007), University of Maryland, Winner of the 2007 Ketchum Award.

A more accessible method is to use [Correlation Coefficients](#) (sometimes referred to as **Pearson's r**), which is a measure of the association between two variables X and Y , giving a value between +1 and -1 inclusive.

Correlation Coefficients can be done by a practitioner right in Excel, or with the help of one's marketing department. If campaign objectives were to increase sales, be sure to collect sales and revenue data from the finance or sales departments along with the average sales price, so hard Target Audience Effect data can be correlated against it. While correlations are fairly simple, it is best to seek help from an expert since factoring in lead-time to lag ratios can be challenging. In other words, Target Audience Activity should result after Activity and Intermediary Effects have been conducted, and often reflect a product's sales cycle in overall timing. For example, if a campaign is run in January, Intermediary Effects may be seen immediately, but Target Audience Effects may not show up until June if the sales cycle is six months.

A very simplified example of a correlation is shown below. In this case, the goal is to see a relationship between a campaign's share of voice and sales leads.

For a likely relationship to exist, a correlation should have an **r value** of at least .7 out of a possible perfect 1.0. The example below shows a very high r value of .80, which indicates that the number of leads are increasing as the campaign's share of voice is increasing. Again, this does not "prove" that share of voice is driving leads, but indicates that a relationship "may" well exist.

Easy Correlations Calculation

- Simple correlations can be generated in Excel using one of the two commands below:

=CORREL or =PEARSON

- Set up an Excel spreadsheet using the first row for time periods, the second for media analysis scores (ideally share of voice), and the third for the desired business results:

	A	B	C	D	E	F	G
	Time Period	Jan	Feb	Mar	Apr	May	Jun
2	SoV %	10.5	14.5	19.5	19	10	50
3	Leads	6	30	60	25	25	70

- In an empty cell in the spreadsheet, enter the cell numbers of the starting and ending values in each row into the formulas above, like this:

=Correl(B2:G2,B3:G3)

- Hit "enter" and the correlation appears – in this case an **r = .80**

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3. Web Analytics

Without a doubt, web analytics is one of the most exciting new frontiers in measurement since tying PR Activity to both Intermediary Effects and Target Audience Effects can be done seamlessly. The PR industry has never had such an opportunity to track its work so easily against KPIs at such little cost. However, it is critical to remember that online conversation accounts for a relatively small percentage of a target audience, so web analytics do not tell the full story. Regardless, spend half a day and learn the ins and outs of a free system like Google Analytics. An excellent book to read ASAP is *Sams Teach Yourself Google Analytics in 10 Minutes* (Miller, 2011). The book is comprised of a series of 10-minute lessons which can be mastered in less than a day. Additionally, Google has developed a great series of “how to” videos for marketing agencies that explain the new features in Google Analytics (<http://www.youtube.com/playlist?list=PL8CAA05A0C16E5EC>).

For additional excellent and in-depth resources into the many marketing uses of web analytics, see the following two books: *Web Analytics: An Hour a Day* (Kaushik, 2007b) and *Web Analytics 2.0* (Kaushik, 2010).

Seth Duncan (2010, pp. 4-6), Analytics Director at WCG (www.wcg.com), shares the following five reasons one really needs to understand web analytics from his IPR white paper, *Using Web Analytics to Measure the Impact of Earned Online Media on Business Outcomes: A Methodological Approach*:

- They are useful for PR – enabling the segmentation of referring traffic (direct, nonpaid search, paid search, referring search keywords, email campaigns, digital advertisements or earned media).
- They can tell what visitors from a particular story do on an organization’s site, which pages they go to, whether they are hitting designated goals, downloading, registering, leaving their email addresses, etc. The percentage of all visitors who take action or click-through is a fundamental measure of success.
- They allow PR to be measured alongside other forms of marketing.
- They can help a practitioner develop strategy with empirical evidence. For instance, is a Twitter account resulting in white paper downloads? Is a particular key message working best at getting visits, engagements, registrations? Should resources be shifted from traditional to social? Which audiences are responding?
- Finally, web analytics can replace marketing mix models – which are very expensive and rarely within reach of the PR department. (Author’s note: marketing mix models measure an enormous number of variables in the marketing discipline, so while web analytics is a good solution for social media, it would be a ‘poor man’s’ model, at best.)

Web analytics can measure both hard and soft goals. For some companies, sales or e-commerce is not an option, so they have to look at indications of interest and loyalty. The most important metrics will be “conversion,” which is “any” desired activity one wants a prospect or customer to engage in. This may be as simple as a click-through to a particular web page, registration to a special community, etc.

There are endless metrics available to look at in web analytics platforms, but many suffer from being too tactical. Avinash Kaushik says many of them – visits, page views, time on site, impressions, clicks, emails sent, followers, likes, video views, etc., simply infer that bigger is better. He goes on to say it’s more important to view metrics that span several sessions to look at a potential target’s true interest over time.

Tips from two Occam's Razor posts, *I Got No Ecommerce. How Do I Measure Success?* (Kaushik, 2007a) and *Your Web Metrics: Super Lame or Super Awesome?* (Kaushik, 2011b) are included below.

3A. For Non E-Commerce Sites:

Kaushik advises organizations without e-commerce websites to get away from "averages" that distort what's really going on, and instead look at "pan-session" (many session) distribution scores:

- Visitor Loyalty – this tells how often a visitor comes to one's site, so realistic goals can be set for the number of visits one expect per week/month and measure against them.
- Visitor Recency – how long has it been since their last visit? Ideally, it would only be a day or two. If 67% of one's audience is new (defined in Google Analytics as having been at one's site "0 days ago," how can one decrease this number and get them to return?
- Length of Visit – this counts length in seconds and reveals truths hidden in averages. See exactly the point at which an audience is lost. Benchmark that number and see what can be done to lengthen engagement. Having an engaged audience may be the defined business outcome.
- Depth of Visit – what is the distribution in number of pages viewed in each session? How can one this number be increased? Measure the percent of visits that encompass many pages versus those that encompass only a few, and look for growth.
- New versus Repeat Visitors - examine the ratio between new and repeat visitors, and between those that come once and those that return more often each month. The number of repeat visitors should increase.
- Conversion Rates in Web Analytics and other Tools – for non e-commerce sites, some of the Intermediary Effects covered earlier can be considered conversions to outcomes, such as:
 - ✓ For blogs - # of reader comments per post
 - ✓ Twitter - # of replies sent per day compared to # of replies received per day
 - ✓ Facebook - # of postings compared to # of comments
 - ✓ Website – the Task Completion Rate – which is the percent of people who come to one's website who answer 'yes' to "Were you able to complete the task you came to this website to do?" Combine this with "Why are you here?" Take a look at the [4Q survey from iPerceptions](#), as mentioned earlier, as a survey tool.
 - ✓ Email - # of goal conversions, values and ROI as available from Google Analytics integration with [PureResponse - Integrated Analytics](#) by Pure360 (www.google.com/analytics/apps).
 - ✓ Bookmarks – # of bookmarks to one's sites, which show where they originated.
 - ✓ Click-throughs - when analyzing inbound traffic to a website, where did those clicks originate? Are there patterns?

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APPENDIX D
MEASURING TARGET AUDIENCE EFFECTS
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3B. E-commerce sites

It is possible today to track every kind of unstructured data found in communications streams all the way through CRM systems such as Salesforce (www.salesforce.com) and sales, enabling side-by-side analysis of social media and internal customer feedback in emails, surveys, private web communities, service notes and chat sessions. These tools provide holistic views of all customer conversations: sentiment, issues and root causes. Some of them even automatically route conversations to the right person in an organization for response, build the relationship and drive towards sales and loyalty. These systems are expensive, but worth every penny for the fortunate organizations that can afford them. A couple great systems include those from [Attensity](http://www.attensity.com) (www.attensity.com) and [Visible Technology](http://www.visibletechnology.com) (www.visibletechnology.com) – the [V·IQ Social Performance Dashboard](#).

For those with smaller budgets, much can be accomplished through Google Analytics or through creating unique URL landing pages, which can direct traffic to sign-up pages for more information, contact requests, email registrations or product page views.

In *Excellent Analytics Tips #19: Identify Website Goal (Economic Values)*, Kaushik (2011a) points out how rare it is that a single PR or social media KPI directly converts all the way to an end goal (like a sale).

For example, a sale would be considered a “macro” conversion, which Kaushik says is completed by only about 2% of website visitors. So what about those other actions that have led to conversions; should they not also be considered goals and have financial values?

Kaushik urges practitioners to assign dollar values to all their goals, whether “macro” or “micro,” which enables them to directly compare the per-visit-value of referrals and keywords. They can then identify which tactics are driving the highest financial values – all right in Google Analytics. Just refer back to *Sams Teach Yourself Google Analytics in 10 Minutes* (Miller, 2011) and read Chapter 14 on “Setting up Goals and Funnels.”

To value a goal, consider how often the visitors who reach the goal become customers. If, for example, a sales team can close 10% of people who request to be contacted, and the average sales transaction is \$500, one might assign \$50 (i.e. 10% of \$500) to a “Contact Me” goal. If only 1% of mailing list sign-ups result in a sale, he might only assign \$5 to an “email sign-up” goal. See other creative ways to “guesstimate” micro values in Kaushik’s (2011a) article cited above.

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3C. Measuring Across Silos

As activities are tracked through to goals, a practitioner may still have questions about what parts of his program were the most effective. Seth Duncan (2010), Analytics Director at WCG (www.wcg.com) has written an outstanding white paper, *Using Web Analytics to Measure the Impact of Earned Online Media as Business Outcomes*, that takes a slightly different approach. The following summarizes one method from his paper, which includes a step by step process for downloading relevant referral data, separating out just the earned media, and categorizing it in Excel by:

- *Site Type* (mainstream media, online media, blogs, forums, etc.)
- *Site Content* (national news, regional news, business press, etc.).

In an Excel spreadsheet, simply list Site Types across the columns and Site Content across the rows. Then, fill in the web metrics (unique visitors, engagement metrics or sales conversion rates) for each cell on one of these two bases:

- *Sum* basis (adding up unique visitors that were referred in each category. This indicates whether mainstream media are producing as many unique visitors as blogs, for example).
- *Average* basis (which divides unique visitors by the number of sources in each category). Duncan recommends this approach because of varying sample sizes. For example, blog posts may have sent more visitors, but how many posts were required?)

Then, compare the web metrics in cross-tabs of two or more category systems. For example, compare sales conversion rates across Site Type and Site Content categories. This allows one to readily see what Site Types and news Category Sites are the most successful referrers.

Tim Marklein (2011) suggests another method for integrating social media results with traditional news media. Since it is a rare PR program that doesn't involve both offline and online outreach, it is becoming increasingly important to integrate across silos to get a full picture. Marklein advises to "get in-line" and look at the intersection of data across disciplines as summarized from his article, *The Big Shift: Moving from Impressions to Engagement*.

- Track social media engagement and audience impressions along with traditional media impressions, in parallel.
- Look at all audience impressions and Cost-per-Thousand Impressions (CPM) across disciplines. (For CPM, divide program costs by the number of impressions that were earned and divide by 1,000).
- Contextualize by noting that the metrics that matter most are those that fit with specific business objectives. For example, for a consumer package goods company, *USA Today* may be most important, but for a B2B, WSJ.com may be. If an organization is niched, an industry blog may matter most. This illustrates the need to go beyond impressions and focus on targeted impressions.
- Add in engagement metrics. For instance, an influencer can't interact with *USA Today*, but he can with an online piece by sharing it via email, blogs and Twitter.

About Angela Jeffrey

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Infusing clients, management and colleagues with excitement about successful PR campaigns dominated 20 years of Angela's career with JCPenney, national agencies and her full-service PR firm, Jeffrey Communications. PRSA Silver Anvils and IABC Gold Quills, plus a bevy of regional awards, were some of her career highlights.

Angela entered the PR measurement world when she couldn't find a low-cost solution for media analysis. To solve the problem, she created a software company to build *PRtrak™*, the first PR analysis tool for print, broadcast and internet coverage. The venture succeeded and was subsequently acquired, first by SDI Inc., then by the former VMS ... and most recently by BurrellesLuce.

Through the years, Angela became a recognized evangelist, thought leader, writer and speaker for PR measurement and evaluation nationwide. Today, Angela runs her latest venture, *Angela Jeffrey & Associates, LLC, dba MeasurementMatch.com*. The firm helps clients write effective research and measurement plans and searches for the right provider services to meet their needs. Its associates include top PR research thinkers from the IPR Commission as well as experts in social media and advertising effectiveness measurement.

In addition, Jeffrey serves as Senior Consultant to *CARMA International*, a global analysis firm with 14 offices in 12 countries. CARMA is dedicated to linking PR outputs with business outcomes, and to providing excellent media analysis through both technical and human analytical processes. For CARMA, Jeffrey oversees product/service development, client satisfaction, business outreach and marketing.

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Endnotes

ⁱ The #SMMStandards Conclave was formed in 2011 to bring together various associations and perspectives working on social media measurement standards. The organizations include the Institute for Public Relations (IPR), International Association for Measurement and Evaluation of Communications (AMEC), Council of PR Firms (CPRF), Digital Analytics Association (DAA), Public Relations Society of America (PRSA), Word of Mouth Marketing Association (WOMMA), International Association of Business Communicators (IABC), Chartered Institute of PR (CIPR), Federation Internationale des Bureaux d'Extraits de Presse (FIBEP), Global Alliance for Public Relations and Communications Management, Society for New Communications Research (SNCR) and the Media Ratings Council. Client participants include research and communication leaders from Dell, Ford Motor Company, General Motors, McDonald's, Procter & Gamble, SAS, Southwest Airlines and Thomson Reuters, as well as many major communications agencies.

ⁱⁱ Shel Holtz Webinar information is not accessible on a free basis. These citations were included in Lecture 4: Measuring Social Media in a paid series. www.holtz.com.

ⁱⁱⁱ NPS is based on the fundamental perspective that every company's customers can be divided into three categories: Promoters, Passives, and Detractors based on one simple question — How likely is it that one would recommend [Company X] to a friend or colleague? These groups can be grouped to get a clear measure of a company's performance through its customers' eyes. Developed by Satmetrix, Bain & Company and Fred Reichheld, info can be accessed at: www.netpromoter.com

^{iv} [The AMEC Valid Metrics Framework, www.amecorg.com](http://www.amecorg.com), Valid Metrics for PR Measurement *Putting The Principles Into Action*, June 7, 2011, pages 14-15, led by Ruth Pestana, formerly of Hill and Knowlton.

^v Fraser Likely presented his paper, "Principles of the use of return on investment (ROI), benefit-cost ratio (BCR), and cost-effectiveness analysis (CEA) financial metrics in a public relations/communication department," at the fall 2012 Social Media Conclave. The paper is the process of being published.