

Your Measurement Toolkit

PRSA/AMEC Measurement Symposium

October 14, 2012



What the Toolkit Includes

I. What are the Barcelona Principles

Please Refer to Measurement Whitepaper

II. The Importance of Goal Setting & Measurement

III. The Principles of How to Measure Media

IV. Measuring Outcomes Through Surveys

V. Measuring Considerations for Social Media

VI. Measuring Business Results

VII. Transparency and Replicability



II. The Importance of Goal Setting & Measurement



An objective must be SMART!

"***Specific***" in that you are specific about your desired outcome.

"***Measurable***" in that you can collect data that is accurate and complete.

"***Actionable***" in that the metrics are easy-to-understand, and it is clear when you chart your performance over time which direction is "good" and which direction is "bad", so that you know when to take action.

"***Relevant***" simply means don't measure things that are not important. A common downfall of process professionals or standards groups is to measure everything, which produces many meaningless measures.

"***Timely***" metrics are those for which you can get the data when you need it.



Worksheet: Setting Objectives *

Business Objectives

- 1.) Who is the target audience?
- 2.) What does the organization want target to do?
- 3.) By when must this be accomplished?

How can PR help achieve this business objective?

State how PR can help *as objectives:*

Objective Test:

- 1.) Is it measurable?
- 2.) Is it an end, not a means?
- 3.) Is it realistic?
- 4.) Time frame?

Revise objective to improve and pass test:



Additional reading from Institute for Public Relations (IPR)

[Guidelines for Setting Measurable Public Relations Objectives:
An Update](#)

[Using Public Relations Research to Drive Business Results](#)

[Public Relations Research for Planning and Evaluation and Guidelines for
Measuring the Effectiveness of PR Programs and Activities](#)

[How to Measure PR's Contribution to Corporate Objectives](#)



III. The Principles of How to Measure Media



Measuring Media

Start. Leave holes.

Demand disinterest.

Publish. Repeat.

Start. Leave holes. Even the U.S. Census has holes. All research does, but get over it and start with what you can. Just state what you are trying to accomplish and know what is missing. If you have serious barriers and want to push some buttons to create a more complete product the next go-round, leave holes in the report stating that you are awaiting funding, data from another department or approval to share more complete information.

Demand disinterest. Research should seek to reflect and understand reality; it should not be biased toward a particular position. The findings of manager, employee, advocate, or agent with skin in the results will always be more suspect than an independent researcher.

Publish. Repeat. Glowing, one-time reports make a great show piece, but rarely inform or drive change. As metrics and analysis are circulated at the rhythm of other corporate reporting – good results or bad – they become respected and believed. Communication becomes – and is credited with being – a managed function contributing to organizational goals.

Measuring Outputs: Media Algorithm

Scorecard Breakdown

Publication/Tier of placement 25 pts

Message Delivery 30 pts

Third party recommendation 15 pts

Tone 15 pts

Prominence 15 pts

- An extension of basic content analysis through **quantitative assessment**
- Coverage rated on **story-by-story basis**
 - 0 to 100 point scale
 - 100 is a “perfect” placement
 - 0 is a “missed opportunity”
- **Read and score coverage, periodically report results**
 - Monthly, Quarterly, etc.



IV. Measuring Outcomes Through Surveys



Survey Primer

WHY SURVEY

In the right context, surveys can be an effective method to measure the impact of communications on a target audience's awareness, attitudes and behaviors and ultimately business outcomes.

Surveys work best in environments where:

- There is a defined and identified target audience that can be accessed.
- A large enough and focused enough communications effort is undertaken to expect noticeable impact in that target audience.
- There is an allowance that outcomes could have been affected by variables beyond point in time communications efforts.
- Alternative methods do not make sense (content analysis, engagement analysis etc.).



Best Practices

Planning tips

Understand the objectives of the business and communications program you are trying to measure.

Determine the survey methodology that will be best suited to measure those objectives.

Clarify how the insights will be used and what value they will add to the business.

Identify the target audience and make sure the survey is reaching them and the questions are relevant to them.

Make sure that each question will give you the right kind of feedback to achieve your survey goals. Measure both quantitatively as well as qualitatively for shifts in:

- Awareness
- Knowledge and understanding
- Interest and consideration
- Intentions and actions taken
- Experience and relationship
- Levels of advocacy and support of brand



Best Practices (cont.)

Design tips

Introduce who is conducting, why the survey is being fielded, the level of confidentiality and how much time participants will have to invest and thank them for their time!

Keep your survey short and to the point and your questions simple and easy to answer.

Start with easier questions and keep more sensitive questions toward the end. Questions should follow a logical flow, with similar questions grouped together.

Try to construct the questions as objectively as possible. Be mindful that questions can influence subsequent questions (via exposure to topics, brands, etc.) so ask unaided questions before aided.

With closed-ended questions, ensure you have an exhaustive list of answer choices and they are all mutually exclusive.

Use a consistent rating scale and make sure your scale is balanced.

Use precise language that is familiar to participants and use consistent word choices and definitions throughout the survey.

Test your survey before you launch – is it clear, is it precise, is it objective, does it offer exhaustive answer possibilities and does the test data in fact answer the objectives you are trying to achieve.



IF NOTHING ELSE, REMEMBER ...

BENCHMARK – IN ORDER TO MAP THE EXTENT OF YOUR IMPACT, ESTABLISH WHERE YOU ARE STARTING FROM.

NEUTRAL - DO NOT FORCE RESPONDENTS TO FORM AN OPINION WHERE ONE MAY NOT EXIST. DO NOT LEAD RESPONDENTS AND DO NOT MAKE ASSUMPTIONS – ASK YOUR QUESTIONS IN A NEUTRAL MANNER AND DON'T ASSUME ANYTHING (E.G., THEY CAN'T RATE THINGS THEY ARE UNFAMILIAR WITH).

PLAN – SURVEYS ARE ONE FORM OF COMMUNICATIONS EVALUATION. DETERMINE IF A SURVEY IS THE RIGHT APPROACH OR THE ONLY APPROACH THAT SHOULD BE TAKEN TO MEASURE OUTCOMES.

RELIABLE -- DESIGN YOUR SURVEYS SO THEY ARE REPEATABLE AND PRODUCE CONSISTENT RESULTS

STRAIGHTFORWARD – DESIGN YOUR QUESTIONS TO BE SIMPLE AND EASY TO ANSWER AND ASK ONE QUESTION AT A TIME.

TARGETED -- WRITE YOUR QUESTIONS FOR THE TARGET AUDIENCE, FOCUS YOUR SURVEY ON YOUR TARGET AUDIENCE AND ASK ONLY THE QUESTIONS THAT RELATE TO OUTCOMES YOU ARE TRYING TO ACHIEVE.

VALID – DESIGN YOUR QUESTIONS SO THEY MEASURE WHAT THEY INTEND TO MEASURE.



V. Measuring Considerations for Social Media



1. DEFINE SOCIAL OBJECTIVES

Social media has evolved beyond “listening” to include market intelligence, community management, customer care, recruitment. Social metrics and measurement need must evolve accordingly

2. ALIGN METRICS WITH OBJECTIVES

Determine whether the charge is to build a community (audience size metrics), drive interaction (response metrics), spread a message (share metrics)

3. EMBRACE RESEARCH FUNDAMENTALS – REPLICABILITY AND TRANSPARENCY

Implement standard processes for measurement and document methodologies

4. BENCHMARK AGAINST COMPETITORS FOR CONTEXT

Leverage trend and competitor data to establish success targets and identify opportunities

5. BALANCE QUANTITATIVE DATA WITH QUALITATIVE ANALYSIS

Quantitative data will tell you what is happening, but qualitative analysis provides insight into why

6. BE AWARE OF YOUR OWN BIASES

Be cognizant of your own prejudices and how cultural biases can adversely impact how you gather and interpret information

7. USE THE LANGUAGE OF YOUR AUDIENCE

Think about the natural language of your target audience, not your press releases, when establishing the terms used to search for social mentions

8. USE TOOLS THAT SUPPORT CUSTOMIZATION

Spam and “bots” are making up ever increasing amounts of social share requiring the use of monitoring tools with more sophisticated filtering functionality

9. THINK OF SOCIAL TOOLS LIKE GPS

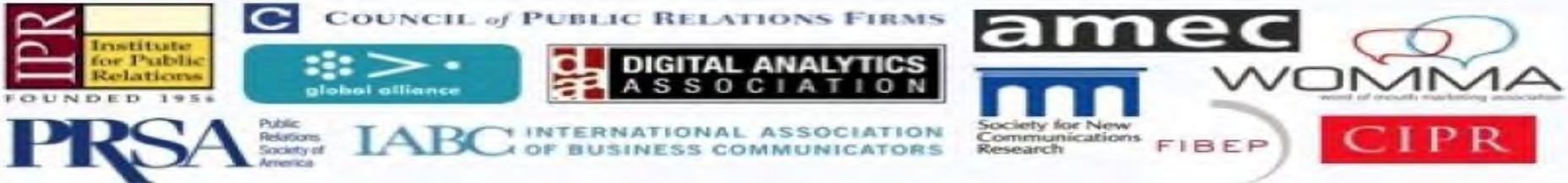
Your outcomes will only be as good as your inputs. All tools have limitations. Your job is to understand them. There is no substitute for common sense interpretations of data. If it feels wrong, it probably is

10. MERCHANDIZE YOUR SOCIAL MEASUREMENT

Use data visualization and a compelling narrative around outcomes to package your social media measurement and make results relevant to senior audiences

SMMStandards Transparency table

A Cross-Industry Effort to Simplify and Unify the Measurement of Social Media



#SMMStandards – Sources & Methods Transparency Table

www.smmstandards.org

Timeframe Analyzed	
Research Lead(s)	
Channels Analyzed	
Data/Content Sources	
Analysis Depth	<input type="checkbox"/> Automated <input type="checkbox"/> Manual <input type="checkbox"/> Hybrid <input type="checkbox"/> All Content Reviewed <input type="checkbox"/> Rep. Sample
Source Languages	
Search Languages	
Sentiment Coding	<input type="checkbox"/> Automated <input type="checkbox"/> Manual <input type="checkbox"/> Hybrid <input type="checkbox"/> Manual Sampling: _____ <input type="checkbox"/> 3-pt scale <input type="checkbox"/> 5-pt scale <input type="checkbox"/> Other scale <input type="checkbox"/> At entity level <input type="checkbox"/> Paragraph/doc level
Spam/Bot Filtering	<input type="checkbox"/> Automated <input type="checkbox"/> Manual <input type="checkbox"/> Hybrid <input type="checkbox"/> Includes news releases <input type="checkbox"/> Excludes releases
Metrics Calculation and Sources	
-- Reach	
-- Engagement	
-- Influence	
--	
Opinion/Advocacy	
Proprietary Methods	
Search Parameters	See full search string list on page ___ of this report

VI. Business Results



How to Measure Business Results

Barcelona Principle 3: The effect of Business Results can and should be measured where possible.

How to attribute the impact from a PR program on business goals/objectives was the highest response (93% considered this very or somewhat important) when reflecting on the importance of PR Measures. *(Attendees of the European Summit on Measurement, 2012 in Dublin).*

While this was a group of people who were focused or highly interested in measurement, it is still true that determining and demonstrating the contribution to PR activity to business results is becoming more significant.



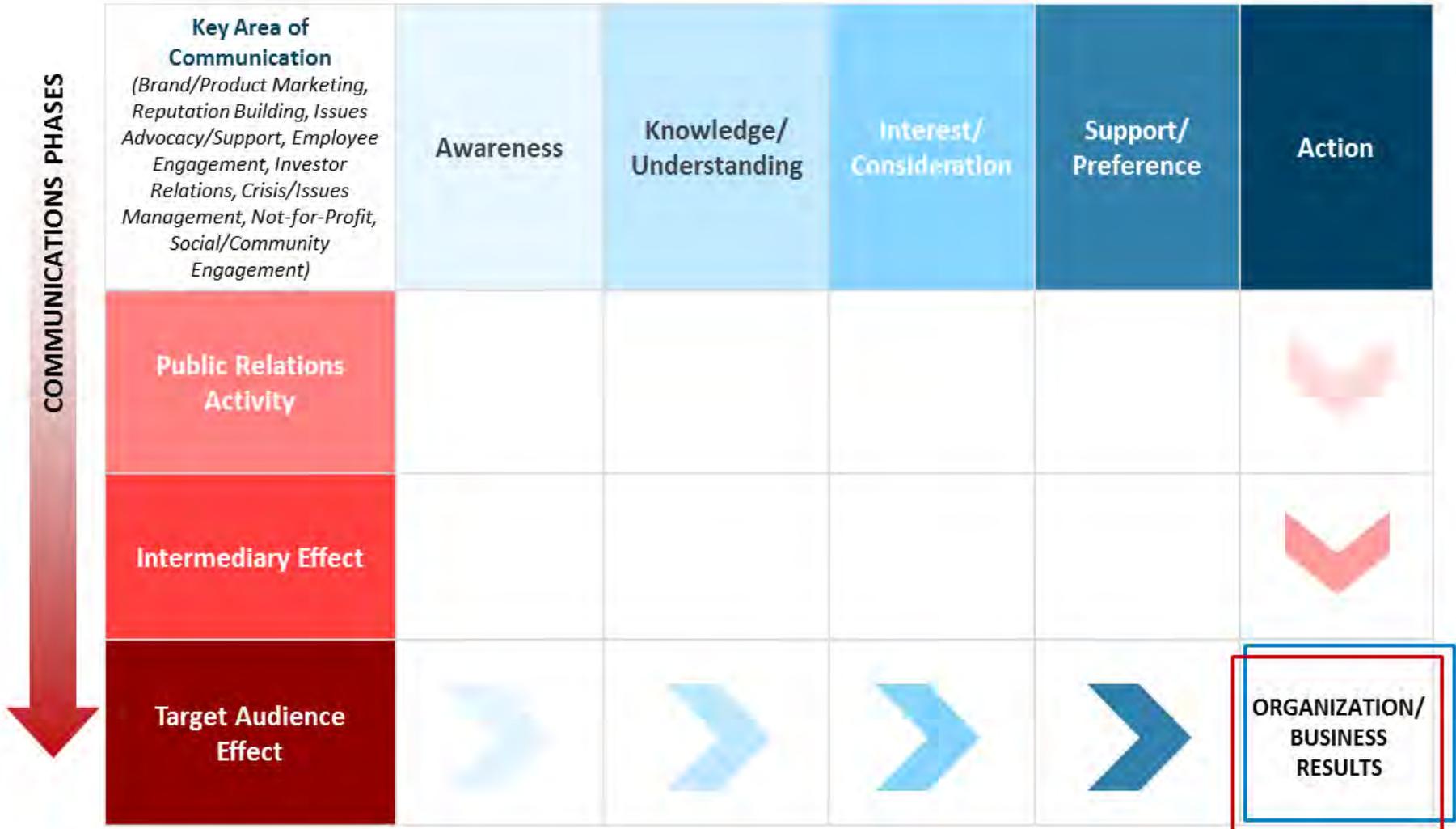
Guidelines for Measuring Business Results

- Understand the business objectives
- Set measurable PR objectives that align
- Speak the language of the C-suite
- Focus on outcome-orientated metrics
- Link what is planned and accomplished by PR to the overall goals and objectives
- Find out what relevant research and measurement is available within the organization outside of Public Relations
- Develop integrated metrics approaches that support the business objectives and decision
- Connect media coverage, Web site traffic and online interaction to business outcomes



The Valid Metrics Framework

COMMUNICATIONS/MARKETING STAGES

Working Example

 Brand/ Product Marketing	Awareness	Knowledge/ Understanding	Interest/ Consideration	Support/ Preference	Action
Public Relations Activity	<ul style="list-style-type: none"> •Content creation •Traditional media engagement •Social media engagement •Influencer engagement •Stakeholder engagement •Events/speeches 				
Intermediary Effect	<ul style="list-style-type: none"> •Audience reach [traditional & social media] •Impressions/Target audience impressions •Number of articles •Video views •Frequency •Prominence •Share of voice 	<ul style="list-style-type: none"> •Key message alignment •Accuracy of facts 	<ul style="list-style-type: none"> •Key message alignment •Frequency of (positive) mentions •Expressed opinions of consideration •Social network Followers •Retweets/Shares/ Linkbacks 	<ul style="list-style-type: none"> •Endorsement by journalists or influencers •Rankings on industry lists •Expressed opinions of preference •Social network Fans •Likes 	
Target Audience Effect	<ul style="list-style-type: none"> •Unaided awareness •Aided awareness 	<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 	<div style="border: 2px solid red; border-radius: 10px; padding: 5px;"> <ul style="list-style-type: none"> •Sales •Market share •Cost savings •Leads generated •Customer loyalty </div>

Example External Metrics for Business Results

- Market share
- Sales
- Donations
- Corporate/Brand reputation measures
- Stock Price
- New contract wins
- Staff retention and recruitment



Techniques to Get at the PR Contribution to Business Results

- Quantitative and Qualitative Media analysis with key metrics that are known to impact the business
- Pre and Post survey research to demonstrate change in attitude and/or behavior
- Market Mixed Modeling/econometrics modeling to show the contribution of various disciplines to the overall business objective
- Web analytics



VII. Transparency and Replicability



Media Measurement

- The goal of the media algorithm is to provide a detailed and consistent metric of measuring media coverage.
- This is an important step in the process of measurement standardization and allows for benchmarking over time.

The Media Algorithm

What is it?

The **Media Algorithm** is a tool that adds a higher level of sophistication to media measurement through a customized scoring system designed to rate each media mention based on criteria that are meaningful to the client.

Objective

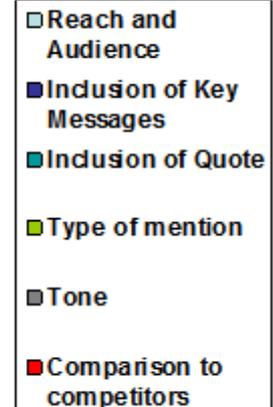
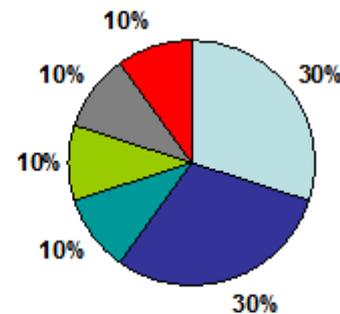
The goal of the media algorithm is to provide a consistent metric of measuring media coverage.

Details

The algorithm assigns a value from 0 to 100 based on the following criteria:

The algorithm is scored based on the following criteria:

- Reach & Audience (media tier)
- Inclusion of Key Messages
- Support for the brand (inclusion of quote)
- Type of Mention (feature, roundup, brief mention)
- Tone of Mention (positive, neutral, negative)
- Comparison to competitors



Surveys and Reporting

- Publicity Surveys vs. Market Research Surveys
- Sampling
- Tab and Banner Plan
- Weighting
- Checking Data
- Reporting

Universal Truths

Tips for writing a good survey

Content

- Write as simply as possible
- Avoid buzzwords or "loaded" words (e.g., "bureaucrat")
- Lead long response options with the most important element
- No double negatives
- No "double-barreled"

Objectives	
Methodology	
Publicity Survey	Market Research Survey
Phone	Online
Random Digital Dial (RDD)	Panel
Sample Size = 1000. (M o E = +/-3.1%)	Sample Size n=384+
25%-30% cell phone	
Approach	
Unanimous perceptions (high %)	Differentiation
Counterintuitive findings	Unexplored perceptions
Usability	
Few and representative response options	Comprehensive & balanced response options
Exclude obvious response options	

Sampling Options

- **Census:** Complete sampling accurate
- **Non-probability Sampling:** Fast, inaccurate; cannot generalize; "convenience sampling"
- **Probability Sampling:** Takes longer in finding an exact microcosm (representative subset) of the population; can generalize

