Measurement and Metrics: The Keys to Managing PR Success
2012 PR News Boot Camp for Emerging PR Stars

Allyson Hugley
EVP, Measurement & Analytics
Weber Shandwick
ahugley@webershandwick.com
@ACME711

weber
shandwick

engaging. always.

What This Section Will Cover:

1. Setting PR Goals and Objectives
2. Monitoring and Measuring PR Efforts
3. Reporting Results to Management

Emerging Data Divide

"It's a revolution. **We're really just getting under way.** But the march of **QUANTIFICATION**, made possible by enormous new sources of data, will sweep through academia, business and government. There is no area that is going to be untouched."
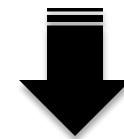
Gary King, Director
Harvard Institute for Quantitative Social Science

PR Measurement Challenges

Language

↓

Methodologies

↓

Metrics

Being on the Winning Side of

Barcelona Declaration of Measurement Principles

1. Importance of goal setting and measurement.

2. Measuring the effect on outcomes is preferred to measuring media results.

3. The effect on business results can and should be measured where possible.

4. Media measurement requires quantity and quality.

5. Advertising value equivalents (AVEs) are not the value of public relations.

6. Social media can and should be measured.

7. Transparency and replicability are paramount to sound measurement.
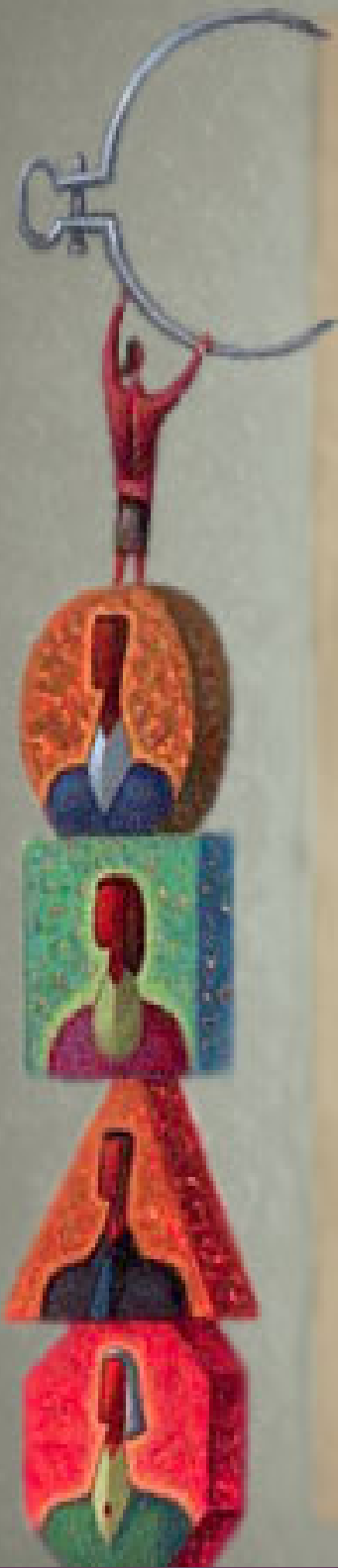
SETTING PR GOALS AND OBJECTIVES

▶ Why Is Goal Setting Important?

Without knowing where you want to get to, it is very hard to define the steps that you need to take to get there

'Would you tell me, please which way I ought to go from here?...'I don't much care where—'

Then it doesn't matter which way you go,' said the Cat. '—so long as I get SOMEWHERE,' Alice added

'Oh, you're sure to do that,' said the Cat, 'if you only walk long enough.'

What Is the Difference Between Goals and Objectives?

Goals	Objectives
Broad, general intentions	Narrowly defined, precise
Intangible	Tangible
Abstract	Concrete
Can't be validated	Can be validated

Examples of Goals vs. Objectives

| Campaign Goals		Objectives
Expand Social Footprint		Grow the number of blog subscribers, fans or influential followers by 20% in the first quarter
Improve Brand Sentiment		Increase the percentage of positive conversations in target media by 5% in three months
Enhance Thought Leadership		Raise the number of thought leadership references by 25% in the first year

What Is the Biggest Barrier to Goal and Objective Setting?

Fear of failure. Avoid this by thinking of objectives and measurement as strategic tools, not a report card

Fear of failure is often at the root of vague goals and objectives

Think of measurable objectives as setting you up for success, not failure—critical to program optimization and course correction, when necessary

FEAR OF FAILURE DEMON

© 2011 RAUL AGUIRRE JR. WWW.MANVSART.COM
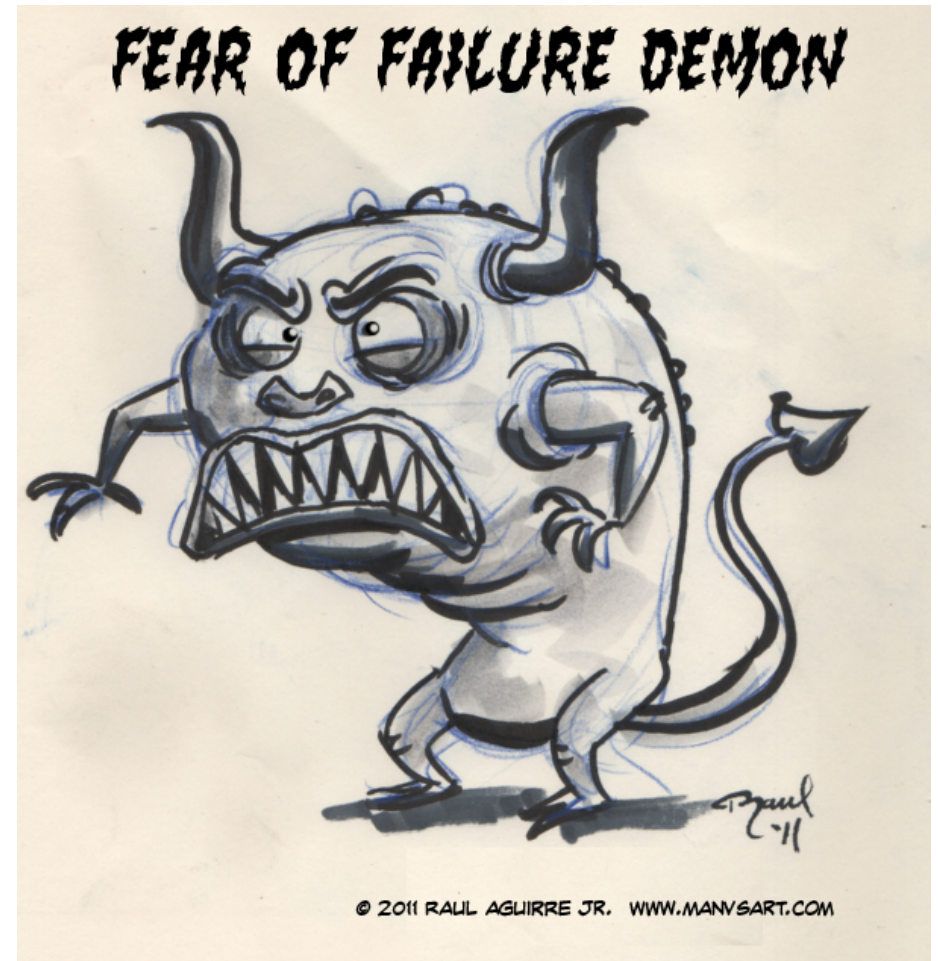
How Do Goals and Objectives Improve PR?

Clear goals and objectives provide:

> **The parameters for establishing the path forward and ensuring that everyone is working toward the same outcomes**

> **Clarity for establishing priorities and allocating resources**

> **The foundation for deciding how best to measure and evaluate success or failure**

What Should Be the Basis for Establishing PR Goals and Objectives?

Business Intelligence. Align communications goals with broader corporate goals. Base thinking on business, market and media data

Possible sources:

- Brand Usage and Attitudes (U&A) research

- Annual reports and strategic plans

- Publicly available market or survey data

- Media analysis

How Can Problematic Objectives Be Avoided?

Use questions to fine tune objectives

Examples of problematic objectives:

- Raise awareness of diabetes

  Among whom? By how much?

- Improve perceptions among moms who have heard of our product

  What perceptions?

- Increase consumer engagement by 10% in the next year

  Where?

- Increase by 5% the percentage of consumers who recommend our brand

  By when?

How Should Objectives Be Organized?

Effectively measuring against objectives requires putting them into appropriate categories

Objective Type	What Is Tracked	How You Track It
Reach	• Target audience opportunity to see / likely exposure to messaging	• Media monitoring / measurement tools
Informational	• The messages target audience should see, hear, read and understand	• Surveys, In-depth interviews • Media content analysis
Attitudinal	• The opinions and views that need to be created, reinforced, or changed	• Survey, In-depth interviews • Social media content analysis
Behavioral	• The behaviors that need to be created, promoted or changed	• Activities tracking (e.g., site visits, store visits, purchases) • Surveys

▶ When Setting Objectives, Is It Better to Play It Safe?

No. Focus on setting well-informed and realistic objectives. Avoid setting the bar too high or too low, and manage expectations

▶ What Is the Most Important Thing to Remember?

Below is a common acronym practitioners use as a checklist for setting objectives

Remember to make PR objectives:

- Specific
- Measurable
- Agreed upon
- Relevant (and realistic)
- Timed

MONITORING AND MEASURING PR EFFORTS

What Is the Difference Between Monitoring and a Measurement Program?

Monitoring	Measurement
Keeps organization abreast of breaking news and topics	Coverage counting and tracking over time to identify patterns and trends
Real-time (or near real-time)	Managed at designated intervals
Qualitative in nature	Quantitative in nature

When Is the Right Time to Start Measuring?

At the beginning. Measurement should be an integral part of program planning discussions. It should happen before, during and after campaigns

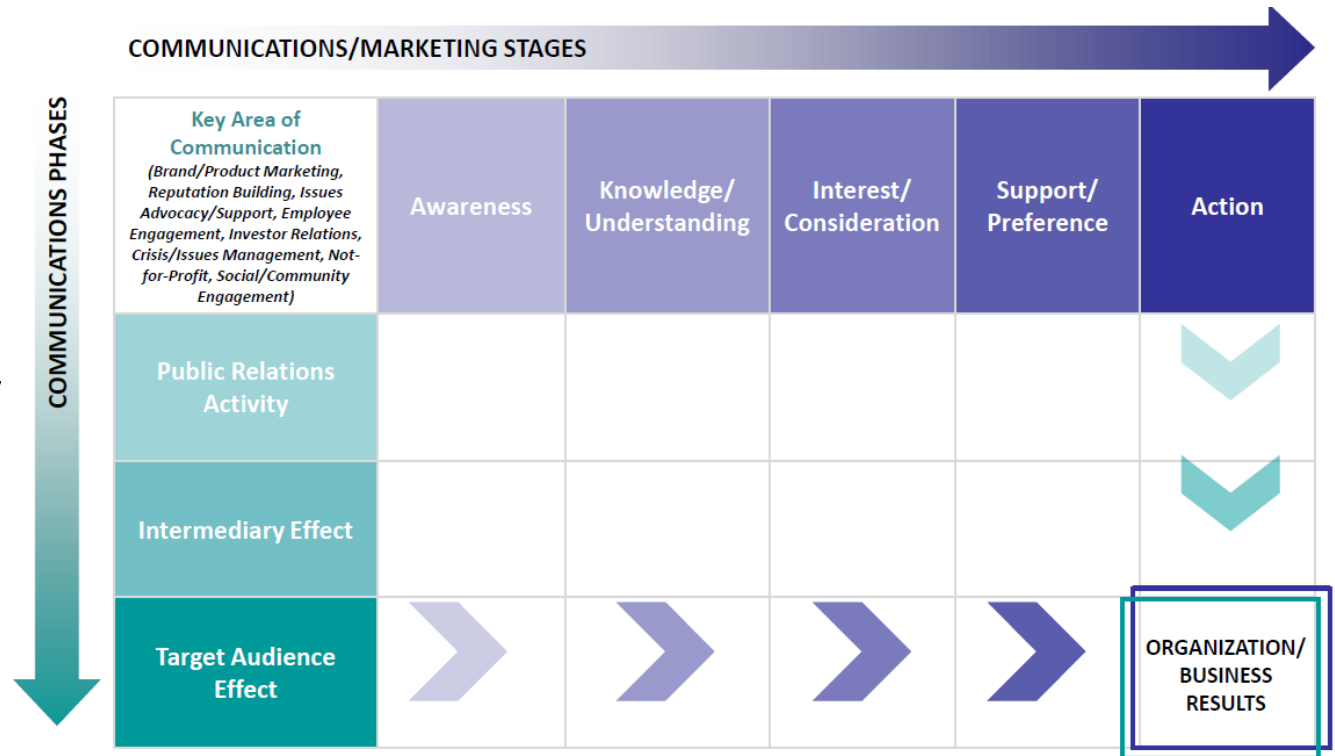|	
Pre-campaign measures	Establish clean baselines; retroactive or "late start" measurement is less useful
During campaign measures	To gauge progress against objectives; to course correct, if need be
Post-campaign measures	To determine final results and outcomes; to inform future work

** Resources Should be Allocated for Measurement from the Beginning **

What is the Right Thing to Measure?

There is no "one number" to measure in PR. Measure activities, intermediary effects and target audience effects that align with business objectives

The Valid Metrics Framework is an industry approved tool developed by AMEC to help practitioners think about how to measure PR value in terms of activities (outputs), interim measures (outtakes), and business results (outcomes)

COMMUNICATIONS/MARKETING STAGES

COMMUNICATIONS PHASES

Key Area of Communication (Brand/Product Marketing, Reputation Building, Issues Advocacy/Support, Employee Engagement, Investor Relations, Crisis/Issues Management, Not-for-Profit, Social/Community Engagement)	Awareness	Knowledge/ Understanding	Interest/ Consideration	Support/ Preference	Action
Public Relations Activity					
Intermediary Effect					
Target Audience Effect					ORGANIZATION/ BUSINESS RESULTS

AMEC Valid Metrics Framework

Brand/ Product Marketing	Awareness	Knowledge	Consideration	Preference	Action
Public Relations Activity	• Content creation • Traditional media engagement • Social media engagement • Influencer engagement • Stakeholder engagement • Events/speeches				
Intermediary Effect	• Audience reach [traditional & social media] • Impressions/Target audience impressions • Number of articles • Video views • Frequency • Prominence • Share of voice	• Key message alignment • Accuracy of facts	• Key message alignment • Frequency of (positive) mentions • Expressed opinions of consideration • Social network Followers • Retweets/Shares/Linkbacks	• Endorsement by journalists or influencers • Rankings on industry lists • Expressed opinions of preference • Social network Fans • Likes	
Target Audience Effect	• Unaided awareness • Aided awareness	• Knowledge of company/product attributes and features • Brand association and differentiation	• Relevance of brand (to consumer/customer) • Visitors to website • Click-thru to site • Time spent on site • Downloads from site • Calls • Event/meeting attendance	• Attitude uplift • Stated intention to buy • Brand preference/ Loyalty/Trust • Endorsement • Requests for quote • Links to site • Trial	**• Sales • Market share • Cost savings • Leads generated • Customer loyalty**

What Is the Right Measurement Tool?

There is no one "right tool" to measure PR. Robust measurement programs rely on a toolbox, rather than a single tool

Establish a toolbox that includes:

- Traditional and social media monitoring tools
- Influencer identification and tracking tools
- Web analytics
- Syndicated media research databases
- Community engagement tracking solutions
- Quantitative stakeholder surveys
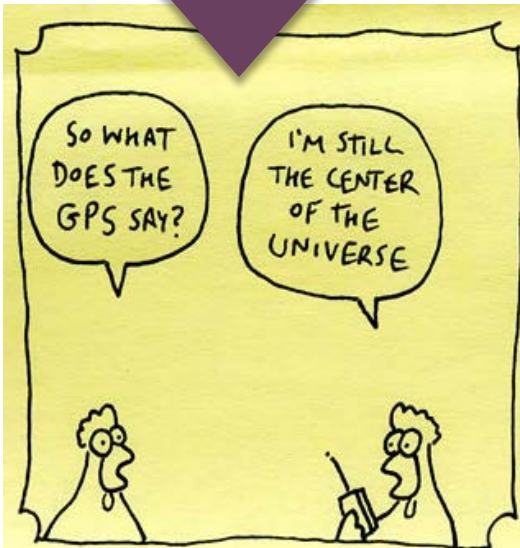- Qualitative interviews

** The right mix of tools should be determined based on program objectives and resources**

Understand the Realities of Monitoring Tools

Outcomes are only as good as the inputs

Understand the limitations of the tools

Tools are not a substitute for common sense

What Defines Meaningful Measures?

Quantity and quality of media coverage. Content analysis and coverage scoring systems should be used to measure and track coverage quality

Volume metrics alone do not provide sufficient insight into what's working, or not working, to be meaningful

Coverage Scoring System (10-point)

CRITERIA	DESCRIPTION	SCORE
Publication/Media Tier (1-3 pts)	Tier 1 – Target Media	3 pts
	Tier 2 – Target Media	2 pts
	Tier 3 – Coverage in other media	1 pt
Coverage Depth (0-2)	Cover Story or Front Page Mention	2 pts
	Extensive Mention or Feature Coverage (50%+)	1 pts
	Minimal or Passing Mention	0 pt
Key Message Inclusion (0-2 pts)	Includes 0 Key Messages/Calls-to-action	0 pts
	Includes 1 Key Message/Call-to-action	1 pt
	Includes 2+ Key Messages/Calls-to-action	2 pts
Coverage Tonality (-1, 0, 1 pt)	Positive Coverage	1 pt
	Neutral Coverage	0
	Negative Coverage	-1 pt
Spokesperson (0-2 pts)	No Spokesperson Mention or Quote Included	0 pts
	1 Spokesperson Mention or Quote Included	1 pt
	2+ Spokesperson Mentions or Quotes Included	2 pts

What Defines Meaningful Measures?

Context. Without a comparison, measurement is just information. To make numbers meaningful, measure against something

75% of our media coverage was positive

—Pre-set objective

> The objective at the outset of our campaign was that 80% of our coverage would be positive, and 75% was

—Competitor

> 75% of our media coverage was positive— and only 50% of our closest competitor's was

—Past performance

> 75% of our media coverage was positive—compared to only 65% in the same time period last year
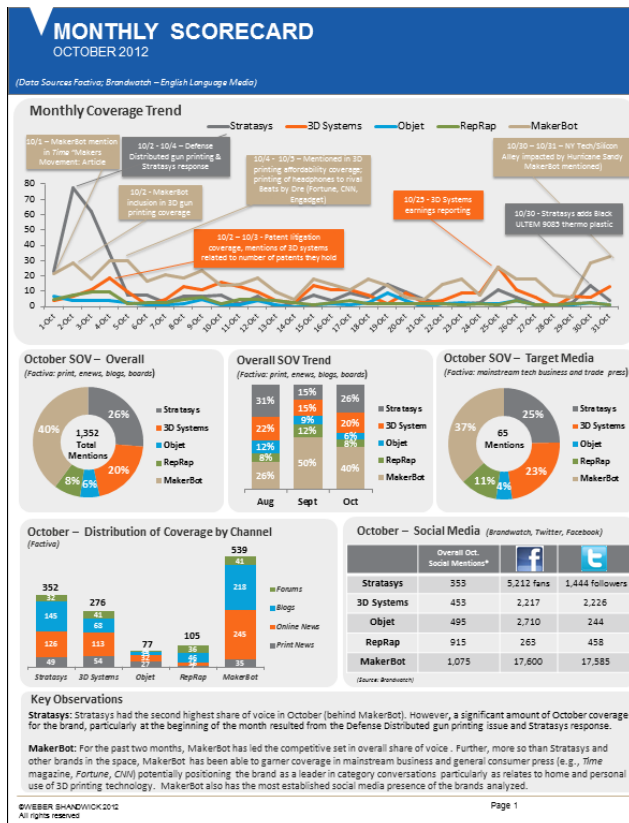
—Key messages

> 75% of our media coverage was positive, but none of our key messages came through
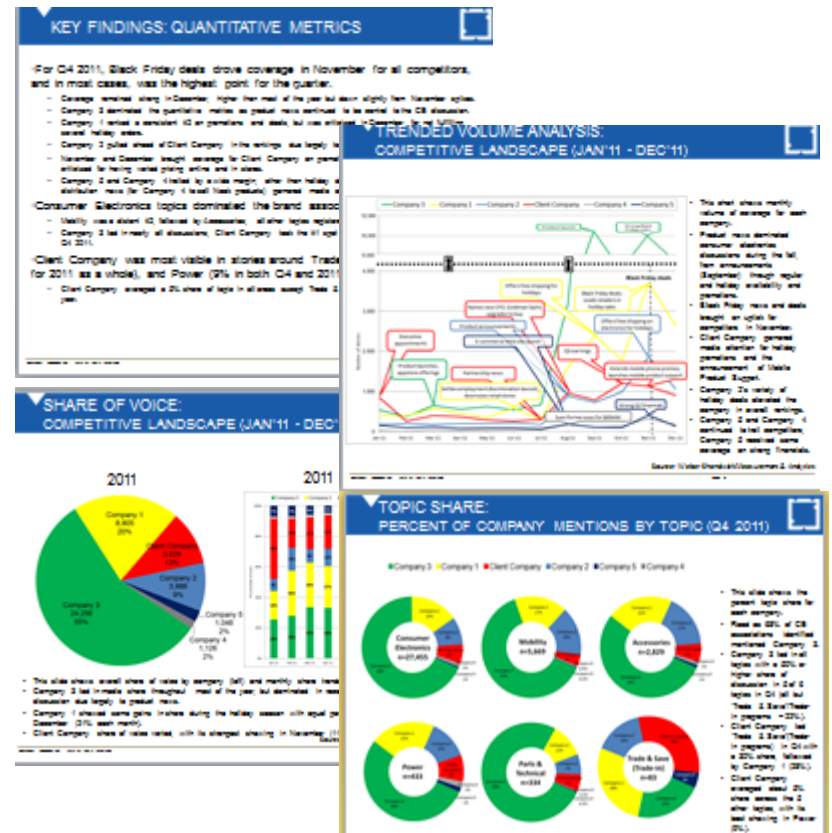
What Is the Appropriate Reporting Frequency?

This depends on the nature of the program, as well as the nature of your organization or client. For annual programs, consider monthly "pulse checks" with quarterly deep dives.

Monthly "Pulse Checks"

Quarterly "Deep-Dives"

REPORTING RESULTS TO MANAGEMENT

What Is the Most Important Thing When Reporting Results to Management?

Understand management's views about data and analytics—what is valued and what is considered a pain point

Managers Expect Measurement to Enhance Their Understanding of the Marketplace

"To grasp the potential impact of Big Data, look to the microscope. The microscope, invented four centuries ago, allowed people to see and measure things as never before — at the cellular level. It was a revolution in measurement. Data measurement is the modern equivalent of the microscope. Google searches, Facebook posts and Twitter messages, for example, make it possible to measure behavior and sentiment in fine detail and as it happens."

Erik Brynjolfsson, Economist
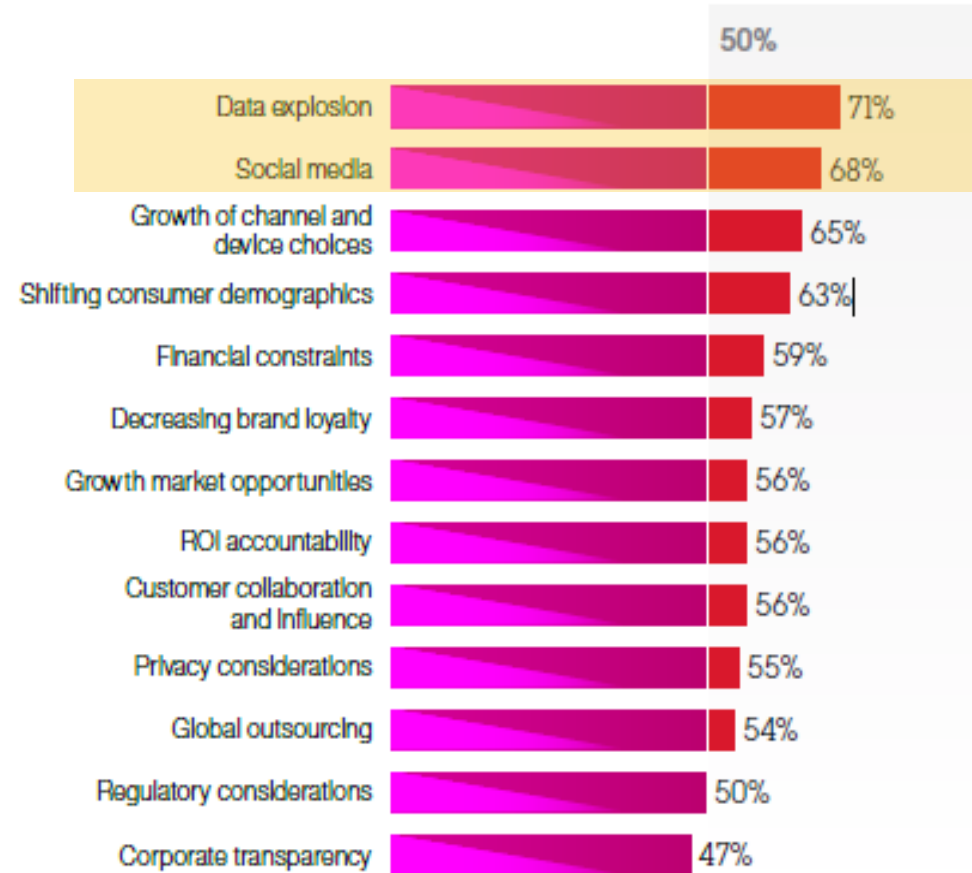*MIT's Sloan School of Management*

Data Overload Is a Pain Point

"In this coming age of complexity and uncertainty, there is a serious risk of 'losing our north,' of being intoxicated by data overload and suffering from indigestion."

Carlos Velazquez, Senior Managing Director, Marketing, Roca Corporación Empresarial

Percent of CMOs reporting underpreparedness

Category	Percent
Data explosion	71%
Social media	68%
Growth of channel and device choices	65%
Shifting consumer demographics	63%
Financial constraints	59%
Decreasing brand loyalty	57%
Growth market opportunities	56%
ROI accountability	56%
Customer collaboration and influence	56%
Privacy considerations	55%
Global outsourcing	54%
Regulatory considerations	50%
Corporate transparency	47%

(marked line at 50%)

Source: IBM CMO C-suite Study, October 2011

What Measures Matter Most?

Measures tied to creating business value. If direct links to business value cannot be established, tie communications measures back to other research within the organization

- – Donations
- – Reputation value
- – Lead generation
- – Likelihood to recommend
- – Purchase intent
- – Sales

Is Reporting More, Better?

Not necessarily. Reporting too much information, or focusing on the wrong information, can be as burdensome to management as reporting too little. Focus on reporting the metrics that matter.

Avoid

| |
|---|
| Dense trackers and excel spreadsheets |
| Large PowerPoint decks heavy on clips and light on data and insights |
| Reporting every measure – limit data to key performance indicators |

Opt for a few golden nuggets over a data dump

Does Presentation Matter?

Yes. Attracting and keeping the attention of management will increasingly require that data be displayed in compelling ways.
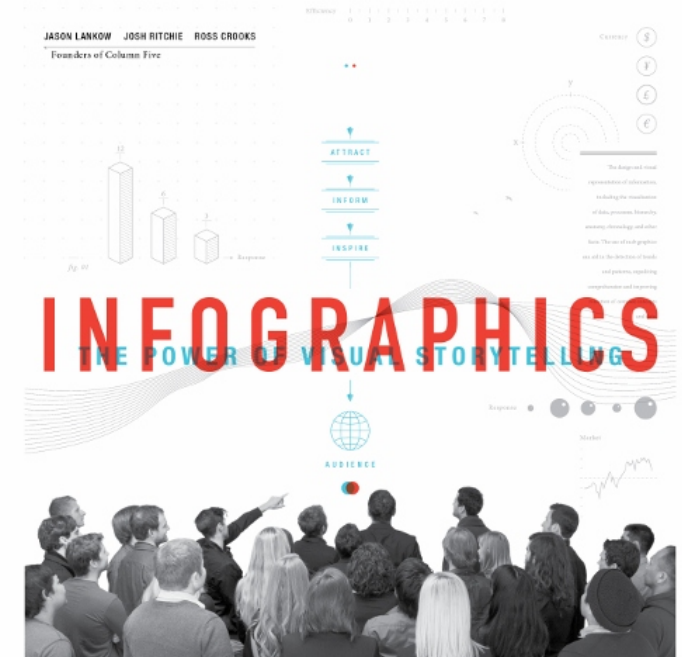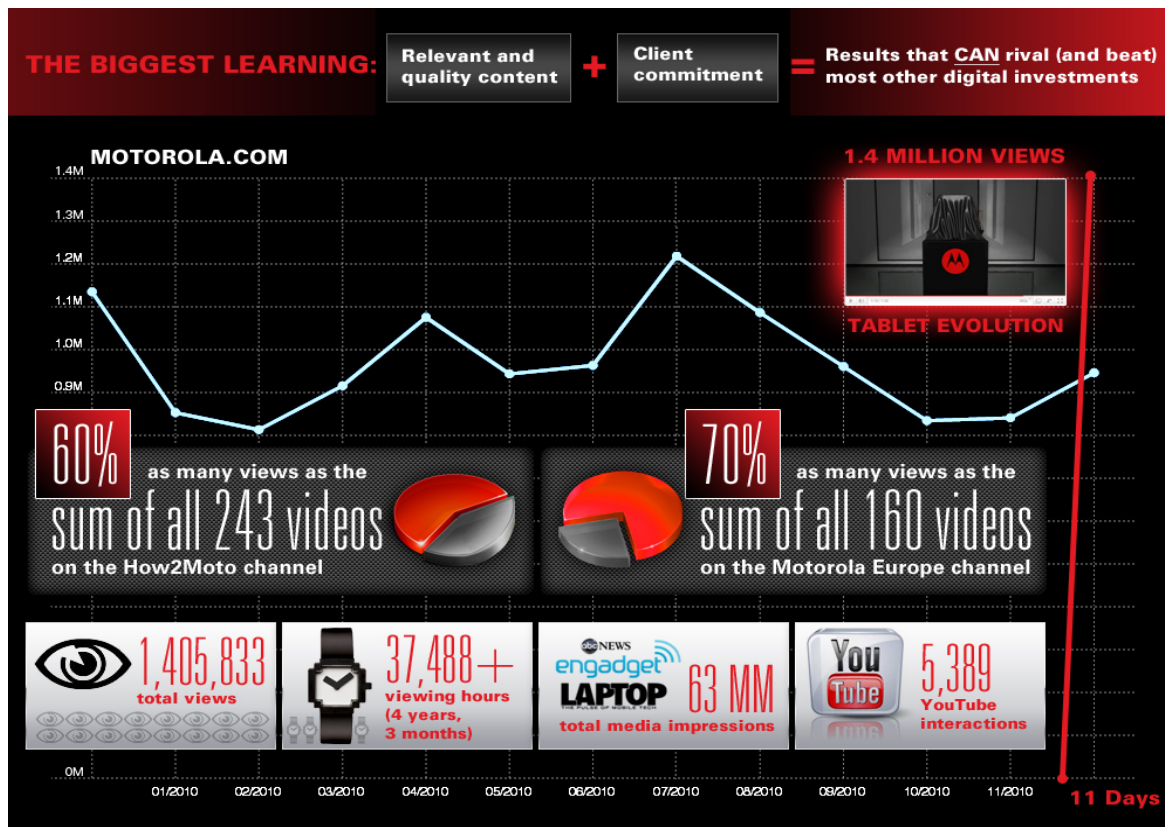
THANK YOU!

Measurement and Metrics: The Keys to Managing PR Success
2012 PR News Boot Camp for Emerging PR Stars

Allyson Hugley
EVP, Measurement & Analytics
Weber Shandwick
ahugley@webershandwick.com
@ACME711

weber
shandwick

engaging, always.
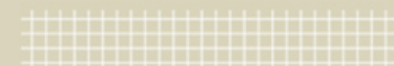
Measurement and Metrics: The Keys to Managing PR Success

PR NEWS BOOT CAMP – WASHINGTON, DC

DON BARTHOLOMEW, SVP DIGITAL & SOCIAL MEDIA RESEARCH

29 November, 2012

Sales =
A + x1PR
+ x2PoP

Ketchum

break **through**

KPIs, Metrics & Measurement
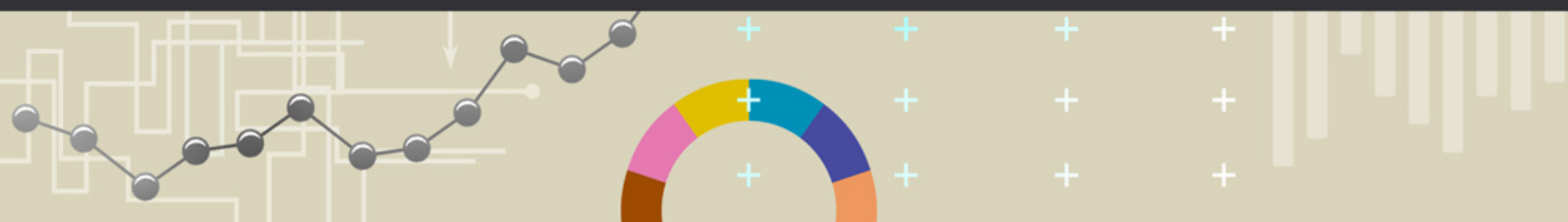
KPIs v. Metrics

- Key Performance Indicator (KPIs) are metrics that help you understand performance against objectives:
  - Outcome oriented
  - Tied to an objective
  - Have targets to track progress

- Metrics are units or standards of measurement

OBJECTIVES → GOALS → KPIs → METRICS

Ketchum Global
Research & Analytics

break through
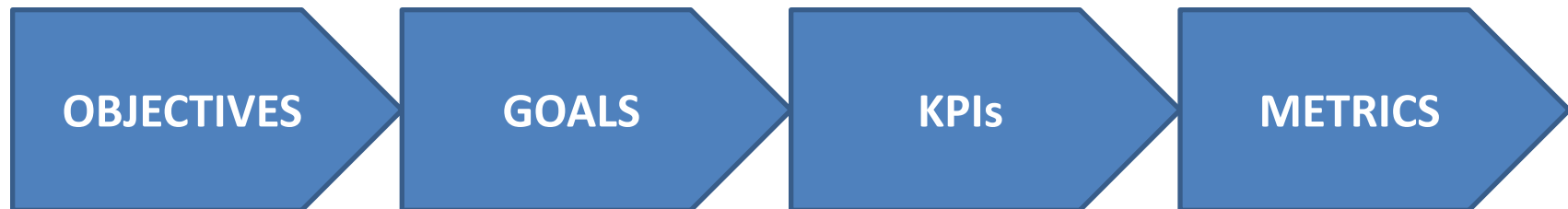
Social Media Measurement Model

AWARENESS ↔ ENGAGEMENT ↔ IMPACT → VALUE

Ketchum Global
Research & Analytics

break **through**
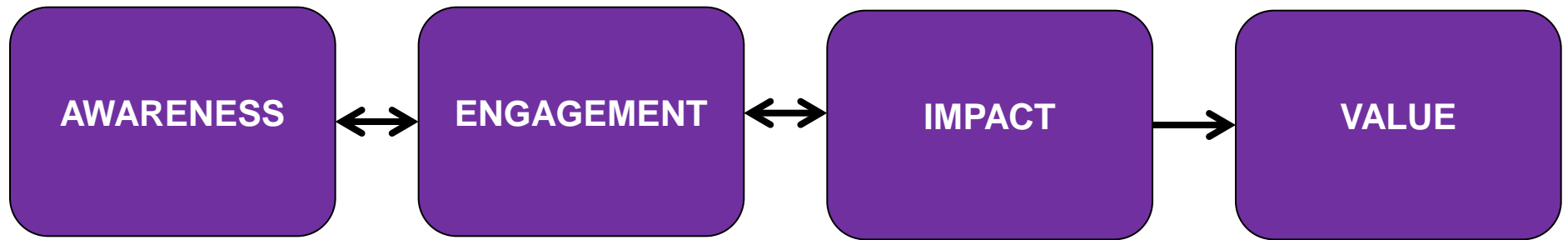
Social Media Metrics

Program Objectives
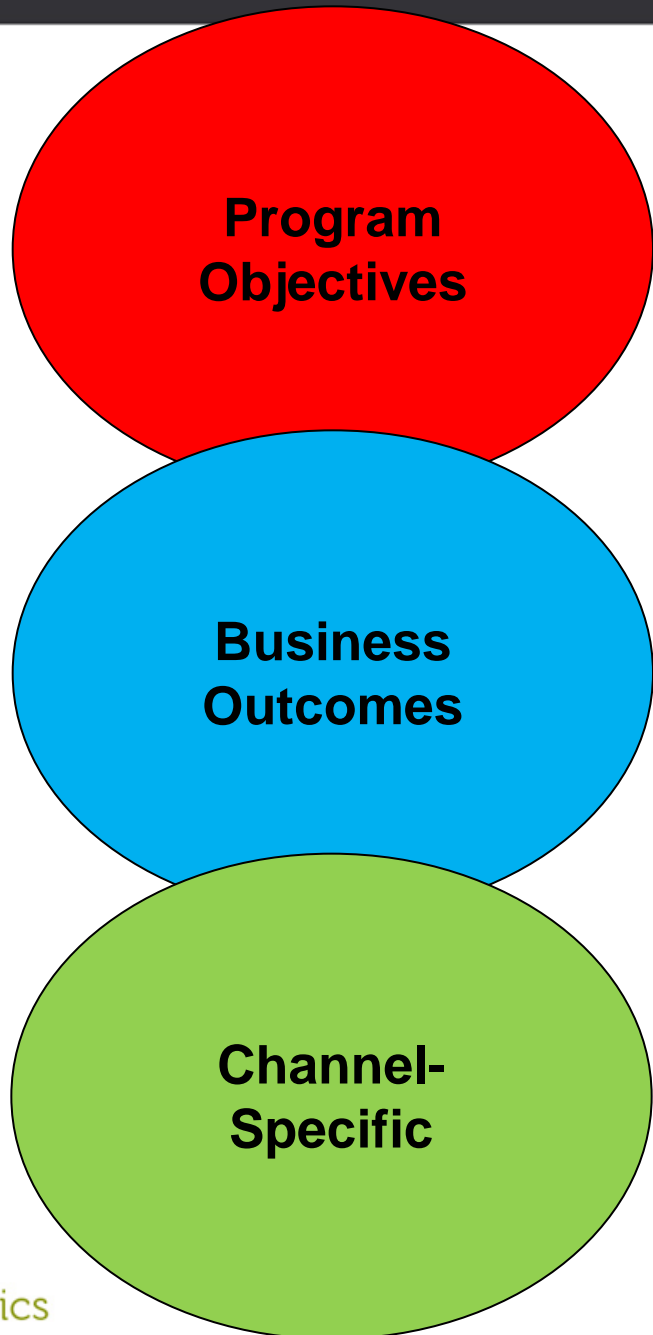
Specific metrics directly tied to program or campaign objectives.

Business Outcomes

Metrics designed to measure the business impact of the campaign, program or initiative

Channel-Specific

Metrics that are unique to specific social channels – Tweets, RTs, 'Talking About This'

Ketchum Global Research & Analytics

break **through**

Measurement Model with Metrics

AWARENESS ↔ **ENGAGEMENT** ↔ **IMPACT** → **VALUE**
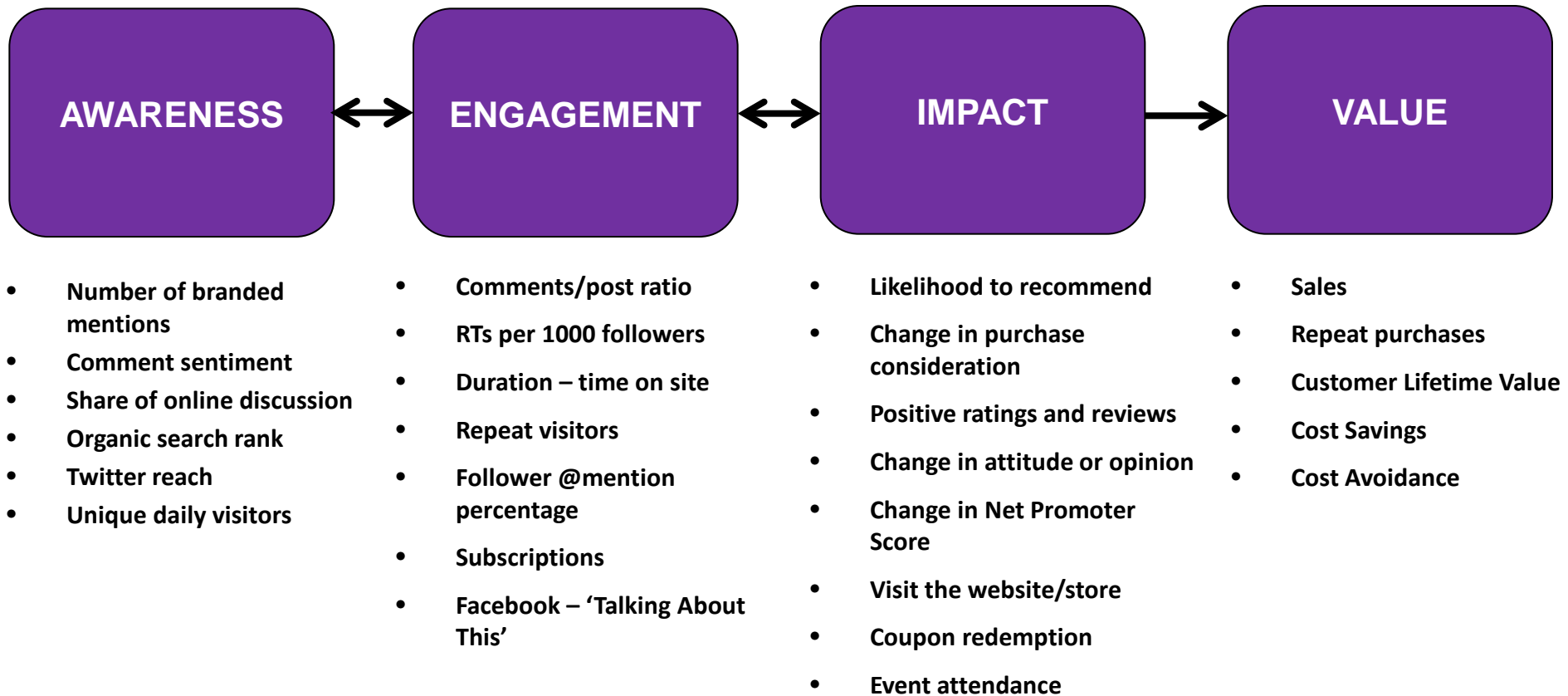
AWARENESS	ENGAGEMENT	IMPACT	VALUE
• Number of branded mentions • Comment sentiment • Share of online discussion • Organic search rank • Twitter reach • Unique daily visitors	• Comments/post ratio • RTs per 1000 followers • Duration – time on site • Repeat visitors • Follower @mention percentage • Subscriptions • Facebook – 'Talking About This'	• Likelihood to recommend • Change in purchase consideration • Positive ratings and reviews • Change in attitude or opinion • Change in Net Promoter Score • Visit the website/store • Coupon redemption • Event attendance	• Sales • Repeat purchases • Customer Lifetime Value • Cost Savings • Cost Avoidance

Ketchum Global
Research & Analytics

Ketchum

break **through**

Measurement Planning Template

Business Objective or Outcome Addressed	KPIs	PR or Social Media Objectives	Measurement Story	Research Approach	Key Metrics

Most Important Metrics are Used on Dashboard

break **through**

Beyond Sentiment to Emotional Content

- **Sentiment analysis is flawed:**
  - Automated not accurate
  - Manual is expensive
  - Sentiment provides little insight

- **Emotional content analysis a big step forward**
  - Emotions drive motivation
  - Limited availability in social
  - Need stronger semantic and NLP analytics
  - Richer environment for insights

Robert Plutchik's Wheel of Emotions

Ketchum Global Research & Analytics
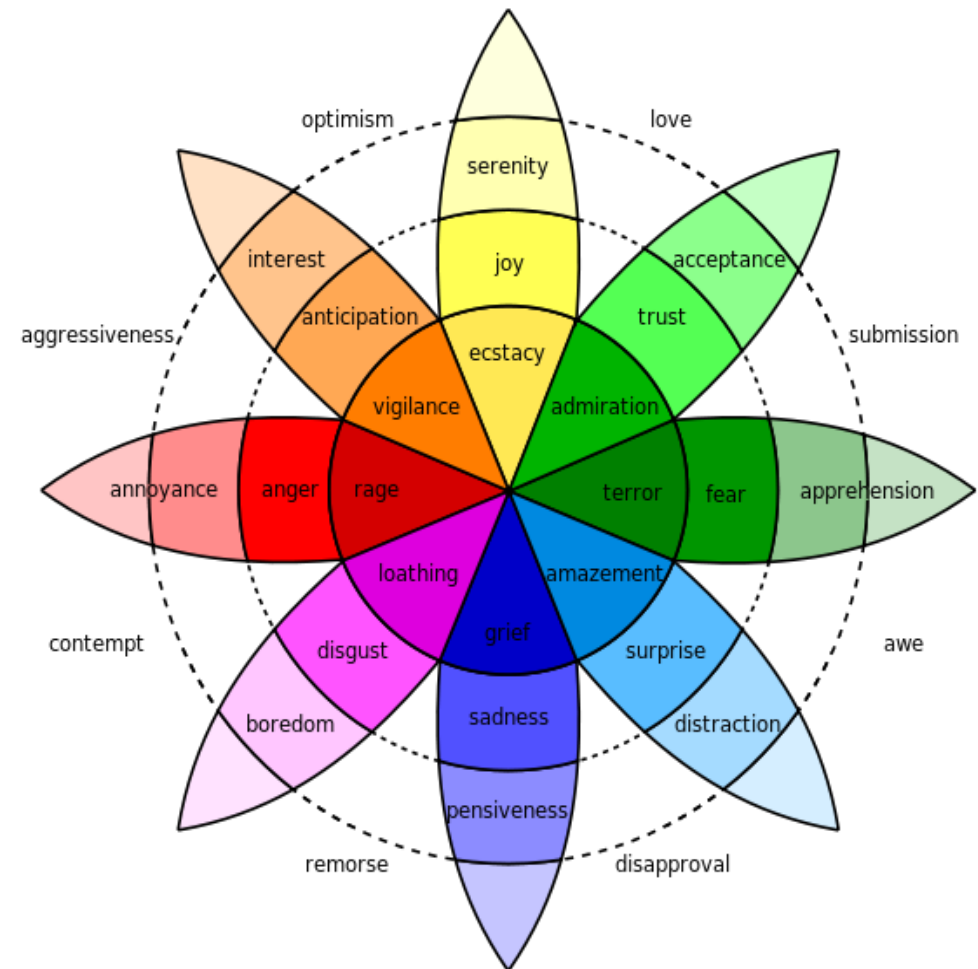
Your Future (or your budget) Depends on Your Ability to Demonstrate Business Impact

- **Requires mindset shift from PR/social media results (Likes and Followers, hits and impressions) to business results**

- **Requires knowledge of how business works**

Ketchum Global
Research & Analytics

break **through**

Social Media Business Impact

Customer Service & Support

Marketing

Talent Acquisition & Retention

Reputation

Public Relations

Research & Listening

Ketchum Global Research & Analytics

Ketchum

break through

Five Ways to Measure Business Impact

1. **Employee Engagement Program**: Measure reduction in employee turnover and any reduction in recruiting costs

2. **Customer Care Program**: Measure reduction in staff necessary to respond to customer service inquiries

3. **Social Media Program**: Use unique URLs and landing pages to assess coupon conversions on eCommerce site

4. **Media Relations Program**: Use exposed/not exposed primary research to assess program uplift on purchase and purchase intent

5. **Integrated Marketing Program**: Use statistical modeling to isolate impact and optimize channels

Ketchum Global
Research & Analytics

Ketchum

break **through**

Social Media Tools & Dashboards

Social Media Listening Maturity Model

	Reactive Alerts	Monitor Social Media	Listen to Conversations	Strategic Listening	Social Intelligence
SCOPE	Google Alerts Periodic check-ins on social channels	Monitor 'owned' social embassies, Monitor social for 'bad' news	Listen to brand conversations Follow competitors & industry trends	Listen and engage with a purpose Enterprise listening strategy	Insights to inform or recalibrate marketing or business strategy
STANCE	REACTIVE → PROACTIVE →				
DATA	BIG DATA → INSIGHTS →				
TOOLS	**FREE TOOLS** Netvibes, Google Alerts, Twitter search, Technorati, Social Mention, HootSuite		**PAID TOOLS** Radian6, Sysomos, Visible Technologies, SocialEyez, Synthesio, Alterian		**MULTIPLE TOOLS** Crimson Hexagon, Google Analytics, SalesForce, Google Adwords, Compete, Dunnhumby

Ketchum Global
Research & Analytics

break through

- Must understand data requirements before tool selection
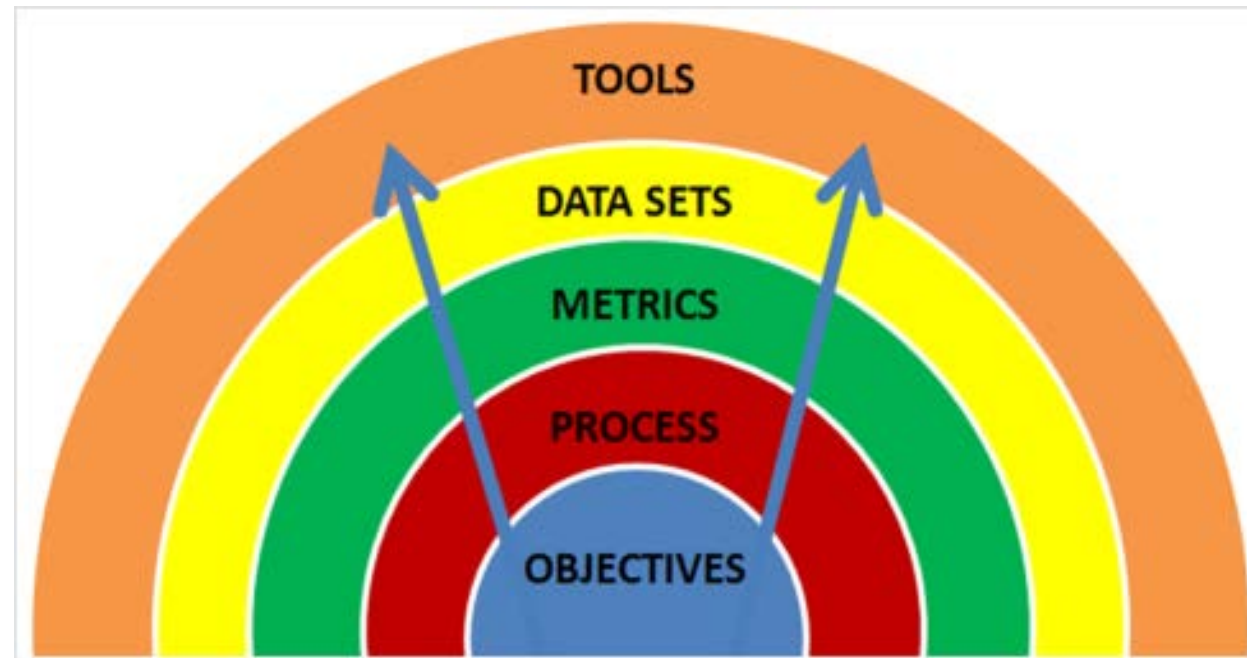
Implementing social media listening capability

1. PLAN

Define requirements, stakeholders and scope

2. SELECT

Strategically evaluate and select a platform that best meets your unique requirements

3. DEPLOY

Configure and deploy the platform across the organization with training and workflow addressed

Ketchum Global Research & Analytics
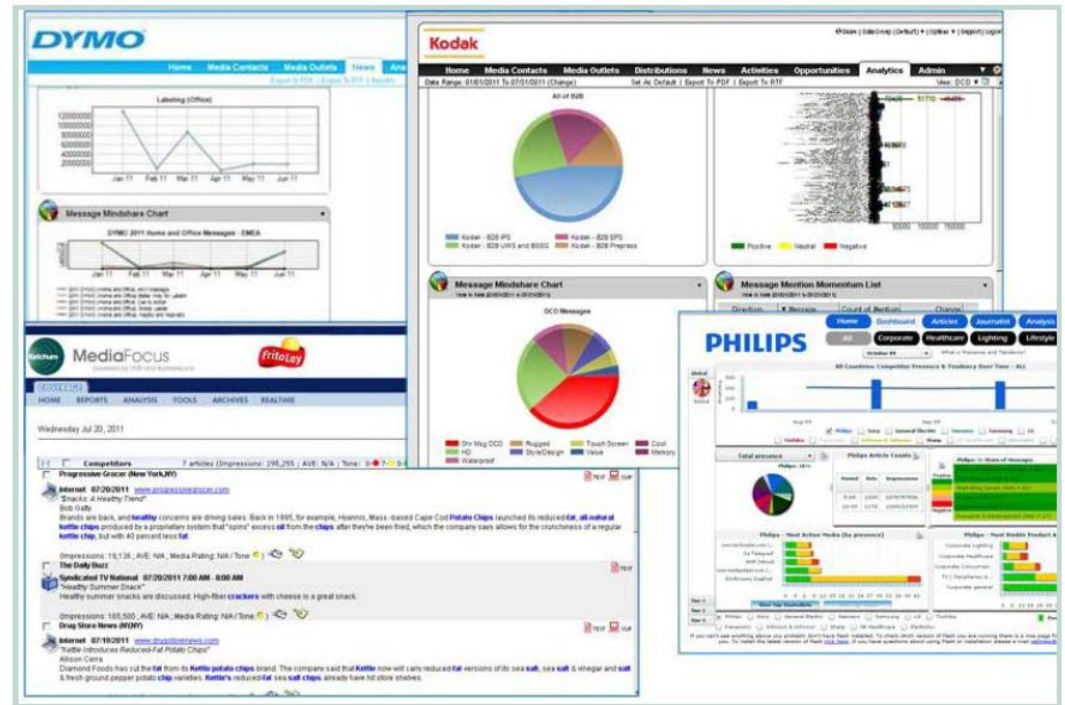
Ketchum

break through

PLAN: Questions for listening and measurement requirements planning

- **STAKEHOLDERS**

- **GEOGRAPHIC SCOPE**

- **BUSINESS SCOPE**

- **CONTENT/DATA TYPES**

- **METRICS & ANALYTICS**

- **KEYWORDS & TOPICS**

- **INTEGRATION**

- **REPORTING**

- **ACCESS**

- **ENGAGEMENT**

Ketchum Global
Research & Analytics

break through

Dashboards

- One-page/screen snapshot of overall performance – quickly understood

- What to put on dashboard a strategic decision

- Dynamic or static

- Dashboards are not THE measurement report

- Decisions – hierarchy and integration

Thank You!

DON BARTHOLOMEW
DON.BARTHOLOMEW@KETCHUM.COM
+1.214.259.3435
HTTP://METRICSMAN.WORDPRESS.COM
@DONBART