

THE BOOK OF
PR MEASUREMENT
STRATEGIES & TACTICS

PRNews

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PR MEASUREMENT
STRATEGIES & TACTICS
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Foreword

Dear reader,

The subjective art of communication has converged with the objective science of accountability to create a new environment for public relations professionals. Now more than ever, the pressure is mounting to assess and quantify the returns on investments in public relations.

The newfound ability to measure everything, especially on social media, has brought with it a new demand for insights. But can you ever really measure the editorial quality of a blog post? Can you quantify the value of actions generated by a press release? What, exactly, is a Tweet from an influencer worth? How does social media help or harm sales? These are the types of questions that PR professionals are now being asked to answer.

That focus on measurement is forcing communicators to think more about outcomes and how the functions of public relations can be tracked and aligned with the business priorities of their organizations.

In this new landscape, new roles have emerged. The audience is no longer a reactive, passive actor. Now they proactively dive into the digital environment in search of information. And brands and organizations—the ones delivering messages to that audience—can listen in on and influence what is being said about them in a totally new way. These roles are only beginning to be understood and mastered, and they are precisely what this 9th edition of *PR News' Book of PR Measurement Strategies & Tactics* seeks to help understand.

Our contributing writers run the gamut of this industry sector. In the more than 40 articles exploring PR measurement contained in this book, our authors bring insights from their roles as agency advisors, corporate practitioners, academics and communications executives.

I want to thank these contributors who so eloquently shared their ideas, tips and best practices. I also want to thank you, our readers, for letting us help you as you learn new skills, hone existing ones and grow your businesses.

Sincerely,

B. Greene

Brian Greene
 Editor
 PR News

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Show the Value of Your Work: Using PR Measurement to Quantify Awareness

By Serena Ehrlich, Sandy Malloy and Vilan Trub

In recent years, the medium over which information management takes place has changed drastically. The Internet and its growing accessibility via mobile and other platforms has connected people in a way that would have seemed far-fetched as recently as the 1990's.

It's 2015, and the Internet is not a Hollywood fantasy but a reality that has given society a wide range of venues to share opinions and tastes, oftentimes in the form of promoting, sharing or discussing news content. For PR professionals, the advent of this medium and the shareability associated with it create a forum where the impact of a news release can be measured and analyzed as never before. The trend of publicly and candidly disclosing opinions is an opportunity that needs to be taken advantage of by all communications professionals.

Keeping track of and measuring the plethora of company-related discussions is the single best way for communications professionals to understand in real time how their business is perceived. This understanding allows communicators to craft more effective messages that trigger responses more closely aligned with

business goals. Tying together business goals and PR shows company leaders how communications programs move people into the sales and marketing funnel in a way previous measurement tools could never track.

Measurement resulting in tangible, actionable data demonstrates that a company's communications effort has been worthwhile

In this environment, it's imperative that communication strategists measure the influence company communication is having on social platforms. The nature of the medium allows conversations to occur 24/7 and to produce a profound impact on a business's reputation. A viral video or a critical customer review can influence the public or even lead to national media coverage within hours of appearing online.

The current speed at which news travels makes it very difficult to counter a crisis after the fact. Managing the spread of information between an organization and the public must be a proactive effort not only to counter any possible crisis but also to create a positive influence on one's target market. That influence is a vital step in the ladder that leads to building a company's brand and value.

Measurement resulting in tangible, actionable data demonstrates that a company's communications effort has been worthwhile and presents a clear return on investment.



Dos and Don'ts

Dos

- Initiate a discussion-monitoring platform.
- Understand and adopt The Barcelona Principles.
- Identify social discussions that may lead to a crisis.
- Use URL builders and other easy technology to measure results.
- Amplify your PR program to increase influence.
- Take credit for your work. Measure everything.

Don'ts

- Don't forget to establish baselines to measure ROI.
- Don't ignore consistent complaints.
- Don't forget to amplify your news programming across social channels.
- Don't disregard the impact of online shares.
- Don't dismiss digital tools as a trend.

Moving potential customer into the sales and marketing funnel starts somewhere, and PR pros need to identify that starting point. Business is a team sport. As is the case with many team sports, scoring doesn't occur without assists. Attributing an action to the marketing channel that preceded the last step taken, or last click attribution, is too common in the measurement arena. It's a measurement practice that tends to disqualify or downplay all influences preceding the last click, giving all the credit to one source. Luckily, new measurement technologies can provide credit throughout the customer's engagement with the brand.

For the PR industry, simply measuring campaign outputs is no longer enough to justify a communications program. A news release has far-reaching effects in the digital

era, far deeper than simply how much media coverage it generated. There needs to be a growing emphasis on outcome measurement, the measurement of market behavior fluctuations. How did a news release influence the market? Has the customer base changed? How? What are people saying about the brand and has there been a change in the types of people talking or the messages they are using? These are questions that can be answered with the implementation of a proper measurement program.

Seeing the need for a series of guidelines to keep track of the impact of communication management, the **International Association for Measurement and Evaluation of Communication** (AMEC) established The Barcelona Principles, seven guidelines for measuring the impact of a PR campaign. The Barcelona Principles were designed to standardize PR measurement and emphasize goal-setting, actionable metrics and alignment with business objectives. In other words, their goal is to prompt communicators to produce real measurement.

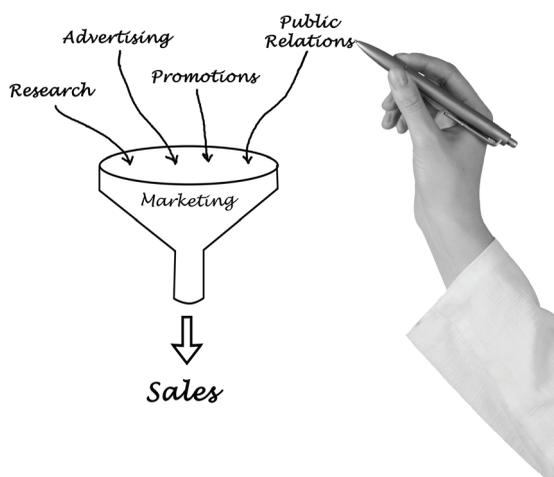
The numbers don't lie. When Lakemaid Beer wanted to spur the popularity of Frosty Winter Lager, one of the brand's seasonal ales, they sought the aid of Pocket Hercules, a Minnesota-based advertising and PR agency. What resulted was a news release that led to 621,000 video views and more than \$5 million worth of editorial coverage. The news release included a video detailing a drone delivering beer along with links leading directly to the company website. The result was an online and social media firestorm that included 18,000 views of the original press release and a 325 percent increase in Twitter followers, according to Stephen Dupont, director of public relations and branded content at Pocket Hercules. Using measurement tools, Lakemaid Beer also was able to see online activity directly influenced by the news release

and visualize a wave that continued to build. The ability to use tools to measure the changes in the crest of that wave made it possible to attribute credit to all those responsible.

Measurement brings attention to all the created awareness that influenced an individual to be a client or customer. Brand recognition can be developed by several months of following a Twitter account, or influence from positive posts on Facebook, or reading complimentary blog articles. A news release that creates several months of conversation online may not drive the desired action on day one but, when combined with future marketing or communications efforts, it may become highly influential later.

When a customer trusts the value of a company enough to purchase a product or service or adopt a belief, he/she often does not give credit to the influence that steered him/her in that direction. It is up to PR strategists to present the evidence of their campaign's influence.

Using analytics and social media tracking tools, you can follow the influence your effort has had on overall sales and the marketing funnel. Tools allow PR to track more than just keywords associated with a news release. While previous PR measurement programs may have been limited to the number of resulting articles, technical improvements now



allow PR pros to track coverage, shares, reach, share of voice, key message alignment and adoption, tone, website visits, website traffic referred from social networks, increased time on website, and social and marketing channel registrations. URL builders and tagged URLs provided by analytics programs such as Google Analytics should be used to help identify not only which promotion is resulting in the highest flow of traffic and conversions but also what changes may be needed on a website to drive even better conversions. A large database of measurements helps identify the connection between PR outreach and the changes a company needs to make to better reach its business goals.

Determining the return on investment of company communications starts with building one's brand via exposure, creating visibility and raising awareness. Casting a net over one's target market allows a PR campaign to aid the marketing and sales branches to reel in credible leads. Leads are the front line of possible customers, individuals who will contribute to the financial growth of a business. PR assists in bringing in leads that potentially can be converted into customers, resulting in money for a company to save and spend.

The most important need for measuring the influence of PR on business-oriented goals is that the conversations taking place online and on social platforms are unregulated. Whether true or not, negative conversations can quickly develop into a crisis directly impacting revenue and stock value. The sooner you can identify negative discussions, the quicker a company can respond to properly reframe the discussion.

Seeing the digital age as a trend and an obstacle for businesses is a mistake.

Your PR presence online influences public opinion, and measuring that influence results in tangible data. That data justifies reinvestment into developing and experimenting with

new communications strategies.

Seeing the digital age as a trend and an obstacle for businesses is a mistake. It is an opportunity to connect directly with consumers and assess how your outreach is influencing the market. PR is integral to a strong online and social media presence, and measurement demonstrates the steps that lead to increased awareness. The days of counting clips are gone and have been replaced by a complicated web of information.

Serena Ehrlich is director of social and evolving media at Business Wire.

Sandy Malloy is manager of licensing and content development at Business Wire.

Vilan Trub is marketing copywriter at Business Wire.

It Pays to Be Social: How Brands Cash In by Showing ROI on Social Media

By Tony Balasandiran

In a consumer's market fueled by social media, brands are turning to multiple social networks to engage various target audiences. Over the years, the train of thought has shifted significantly from questioning the value of social media to strategically determining which channels are the most effective in reaching key audiences and which can impact business models to truly influence consumer behavior. The question for many of these brands, however, remains the same: How is the return on investment (ROI) determined?

Getting the target audience to the party is only half the battle. Keeping it there is the challenge.

Today, competing brands are heavily active on social media and are, more often than not, targeting the same, or very similar, audiences. Success is more complicated than setting up a profile, posting promotional content and counting followers. Today, success is sparking conversation, sharing compelling content and creating sustained engagement with an audience. It's called social media for a reason, and brands looking to define ROI certainly should remember this when developing content and engagement strategies. Social media is not about just being at the party—success is being the life of the party, and this is a good starting point for measuring ROI.

In its early stages, social media success could be measured in more simple terms. Metrics included the number of fans or followers a brand had or grew over a given period of time, often led by a social good campaign, fan sweepstakes or signature program. While those metrics still are very relevant for brands to extend their reach and expand visibility with key consumers, getting the target audience to the party is only half the battle. Keeping it there is the challenge. This is where the quality of a brand's content determines how it ultimately impacts ROI measurement.

For brands, setting metrics to define what success should look like starts with aligning social media objectives with overall business goals. Success will vary from brand to brand, program to program, and campaign to campaign. Social media ROI, however, should be defined in tandem to ensure alignment with brand strategy. It's important to determine first the purpose of the engagement the brand is planning to accomplish as well as what business goals will be achieved as a result of incorporating a social media strategy. A brand looking to drive sales for a specific product or event will have a different strategy than one seeking to generate consumer engagement around a social good campaign.

With most national programs or events, a primary objective is to influence consumer behavior. Whether it be to establish brand loyalty, drive voting, increase ticket sales,

bolster website traffic or engagement with content, brands are looking to create an organic connection with target audiences. That's why social media makes sense for brands. The majority of these consumer audiences is already participating in these networks and initiating conversations. These online conversations oftentimes are about brands, and they can be used to shape consumer actions.

In my agency's 25 years of reaching multicultural audiences, however, experience has shown that cultural insights should always shape the way brands communicate with consumers, especially on social media. For brands looking to engage multiple audiences across cultural demographics, creating an authentic brand voice is imperative to measuring ROI and gauging success for content strategy.

For brands looking to increase online voting, ticket sales or website traffic, social media content always should include a link to the destination the brand is looking to drive its audience to. Clicks on links typically are factored into ROI. A tip for maximizing effectiveness with clicks is to include direct links, driving the consumer to the specific location. For example, if there are separate pages on the website for voting or ticket sales, use those direct links. Sending the audience directly to where the brand wants it to be is a simple, easy and effective way to influence consumer behavior and ROI.

Regardless of a brand's intents and purpose for utilizing social media, there are a few key factors that come along with achieving desired results that will contribute to the bottom line, whatever that may be. Below are five steps that will help achieve desired social media success, determine ROI and meet the bottom line.

- **Know your audience.** All brands know exactly whom they wish to target based

on demographics and characteristics. But, brands must also know who's following whom, or what, on social media, not only from an age, location or gender perspective but also based on interests and motivations. Understand who follows you and what they follow. In an increasingly multicultural U.S. market, these programs could very likely be focused around a specific target demographic, and social media strategy would be incorporated to create a connection with these specific consumers. This is an important step in establishing what ROI can look like, as people of varying cultural demographics have different consumer habits.

- **Engage more, promote less.** Consumers aren't interested in following brands that bombard them with product and service news all the time. Instead, they seek brands that invite them to actively participate in discussions and experiences. They want to know that their thoughts matter to the brand. When determining ROI, keep this in mind when creating content that organically ties back to a product or service

In measuring the ROI for social media engagement, you must measure your objectives against the achieved results to see how they stack up.

- **Content is king.** Engaging and relevant photo or video content can go a long way. Several industry studies have suggested that visual content performs much better than text-only posts. You can't just slap a photo up and think it will generate engagement. You have to be sure it's something your audience wants to see.

With video content, it's not just about the visual but all accompanying elements, from the music to the angles to the video treatment. Using this insight to produce content will lead to stronger engagement which will contribute to increasing ROI for the brand.

- **Incentivize your audience.** One way to build followers and maintain engagement is to offer incentives for followers and follower referrals. Consumers love free giveaways from brands, and social media is an ideal place to do that, even if the incentive is being the first to learn about a sale, promo or piece of news. This keeps people coming back, creates more opportunities for them to share the brand's content and make referrals to other consumers within their networks, which impacts ROI.
- **Track your engagement.** Consistently monitor the content and make note of which posts spark the most engagement. This will keep brands well versed on what target audiences engage with on social media, and it will help map an ef-

fective content strategy moving forward. This also helps in measuring ROI, or even redefining ROI, as brands can then effectively see what content works and may not work.

In measuring the ROI for social media engagement, you must measure your objectives against the achieved results to see how they stack up. For starters, you must determine whether or not your goals have been met and, if so, how social media played a part. Does your reporting illustrate that social media was a sole or primary driver in achieving results?

By following these suggested tips, you'll be able to successfully and effectively measure the true ROI of social media engagement. When properly aligned on the front end, social media can be a driving force in achieving business goals, building a base of brand advocates and delivering desired results.

Tony Balasandiran is account supervisor at Flowers Communications Group.

Dashboards: From Data Visualization To Actionable Business Insights

By Sarab Kochhar

Not everything that can be counted counts and not everything that counts can be counted.” This quote by Albert Einstein sums up the current state of measurement in our industry.

Like many other terms, dashboards and scorecards are words often used in the measurement world without much thought. Typically, dashboards are used as data visualization tools that help discover trends, patterns and relationships that reveal business performance.

Dashboards also enable executives and managers to quickly identify and address critical problems undermining organizational progress. Traditional dashboard design focuses almost exclusively on defining the success metrics then piecing together a bunch of charts and gauges to present that information. However, dashboards should not be thought of as just another reporting document that can be stored. Instead, dashboards should be used as a learning tool that the senior management wants to see ahead of time and use to inform their decisions.

Whenever quantitative information is presented, that information should stand out clearly, without distraction.

Dashboards should not be seen as just data visualization tools but should help make

smarter and more effective business decisions. This article addresses the role of dashboards as shifting from a mere data visualization tool to direct action on data. The article first discusses how dashboards are used as a data visualization tool and then provides context on how dashboards can be used as a strategic rather than just an operational tool.

Dashboards as Data Visualization Tools

Dashboards have become a popular way to present critical information at a glance, but few do so effectively. A dashboard is a “visual display of the most important information needed to achieve one or more objectives; consolidated and arranged on a single screen so the information can be monitored at a glance¹.”

Dashboards summarize key performance metrics of organizations and integrate data from different sources to display performance measures through informative graphics. The visualization helps understand complex data and analyze the information in less time than it would take to read a full report. Dashboards, whether static (providing metrics at a particular time, e.g., .PDF files) or dynamic (providing metrics in real time, e.g., interactive web dashboards), indicate the status of an item or the state of a performance metric compared with a goal or a target value.

Some key questions to consider before creating a dashboard are about the audience the dashboard is for, the value the dashboard

will add and the type of dashboard that needs to be created. A dashboard can serve many purposes, and one should take a moment to consider what they need the dashboard to help accomplish. Is it to help management define what's important, or is it to communicate progress and success? The scope of a dashboard—whether broad or specific—needs to be defined and so does its business role.

A strategic dashboard will provide a high-level, broad and long-term view of performance, whereas an operational dashboard will provide a focused, near-term and tactical view of performance. The level of detail, point of view, level of interactivity and timeliness will also vary based on the situation.

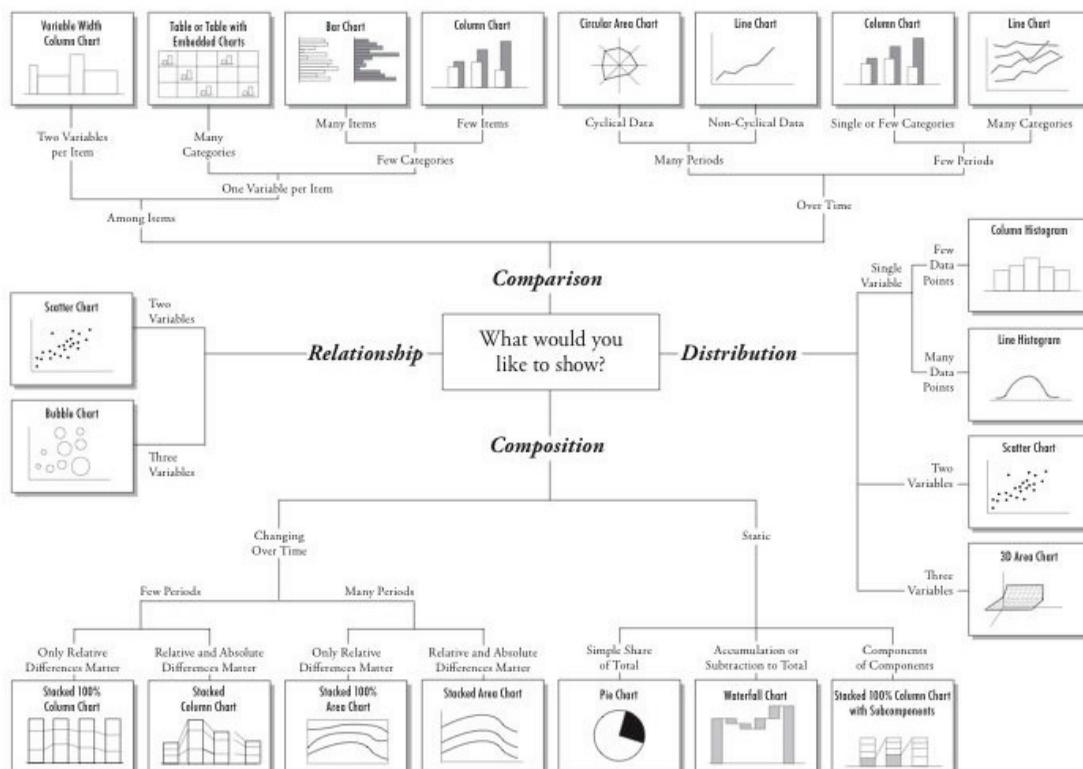
Some key elements of a good dashboard are:

1. The ability to be broken into bite-sized pieces, each built around a key question
2. Key metrics that will focus users on actionable information

3. A clear structure that will emphasize the relationships between measures
4. Increasing detail from (a) key metric to (b) context around the metric to (c) full breakout detail for the metric
5. Flexibility to allow the dashboard to become relevant for different users

Dashboards are often referred to as a data visualization tool for data presentation and analysis purposes. However, it's important to understand the role of dashboards as not merely a “data visualization” tool but as a way to visualize and communicate the information. Dashboards should have the power to show data visually, to reveal details, to simplify and to help make better business decisions. Statistical information is abstract and thus is often miscommunicated. The decisions on how to display the information and choose a medium to communicate it most effectively

Chart Suggestions—A Thought-Starter



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Strategic Dashboard Checklist

- Clarify the actual strategy the dashboard monitors.
- Include management teams in the design of balanced, multidimensional metrics and targets to boost accountability.
- Invest in data collection, infrastructure, analysis, management.
- Used the dashboard to trigger strategic analysis, discussion, decision making.
- Are we measuring what we actually hope to accomplish through our strategy?
- Do our dashboard metrics help us track progress in implementing critical path initiatives?
- Do we periodically validate the metrics we use, confirming alignment?

are often arbitrary and ineffective.

Dashboards as data visualization tools should begin with first selecting the best medium of display for the information and then designing the visual components of the display to convey the message. There are several ways of summarizing and presenting information, such as tables, graphs, icons, text. Appropriate selection of the medium is important for an effective dashboard. A table works best when the values must be displayed precisely and individual values needs to be emphasized. A graph works best when entire sets of values must be compared and the message is contained in the shape of the data (patterns, trends, exceptions to the norm).

Whenever quantitative information is presented, that information should stand out clearly, without distraction. This involves eliminating anything that doesn't represent information. Identifying the most effective graphical element and the charts that will provide the most convincing display of information is very critical. You can use the chart chooser diagram to help select the charts.

But the decision-makers need more than visuals and graphs—they need insights. The key question to ask is: When reviewing the dashboard, do we progress beyond “How did we do?” to “Why?” and “What's next?” Is the dashboard being used merely as a reporting tool or rather to further strategic insight?

Does the leadership team use the dashboard regularly, in multiple forums, with a range of staff and stakeholders?

Turning Insights Into Effective Frontline Action

Gathering the right data and developing models alone would not yield impact unless companies can also turn data-driven insights into effective action on the front line. In general, dashboards should be oriented toward enhancing the organization's strategic goals. The usability of the dashboards would be greater if the performance measures also reflected such indicators.

The four C's process can be used to focus on generating insights relevant to your business:

1. **Collect:** Data quality is key to the credibility of dashboard performance measures. Significant errors or lack of common standards compromise quality.
2. **Connect:** Connect data to specific segments or even individuals.
3. **Control:** Manage the volume and speed of data. What techniques, algorithms and storage solutions would be needed to control the data and manage it?
4. **Collaborate:** Use statistics, reporting and visualization tools to come up with the key insights that will generate value for the business.

The growing philosophy and culture in every organization around “what gets measured, gets approved” has increased the focus on performance measurement. Thus, the demand for dashboards and tools that go beyond the data visualization has increased.

Developing Strategic Dashboards

The dashboard display of information should facilitate management’s insight into business performance with respect to achieving its goals. Thus, a basic question at the start of a dashboard project is whether a dashboard has the potential to improve insight. Dashboards should simplify, prioritize and analyze the data most important for making business decisions.

Dashboards suffer not from poor indicators but from poor linkage with actual strategy.

The challenge is to move beyond operational and tactical dashboards to more strategic dashboards. Operational dashboards track core operational processes and often display more real-time data. Operational dashboards emphasize monitoring more than analysis and management. Strategic dashboards monitor the execution of corporate strategic objectives at each level of the organization and emphasize management more than monitoring and analysis.

They are often implemented to support a balanced scorecard methodology. The focus of a strategic dashboard is on executing strategy, the emphasis is on collaborating and the scope is enterprise-wide.

Strategic dashboards should enable people to see the patterns, trends and relationships within the data that leads to insights. Armed with these insights, decision makers can take clear and concrete actions to drive desired

outcomes. Dashboards should integrate and synthesize two key imperatives required by any organization: performance management and business intelligence. Together, these imperatives can help an organization reach greater levels of effectiveness, efficiency and success.

Dashboards suffer not from poor indicators but from poor linkage with actual strategy.

Performance dashboards have gained popularity as a method for executives to easily keep an eye on key business metrics and move quickly through layers of actionable data to obtain the insight they need to resolve issues quickly. More than just a plain dashboard or scorecard that displays some performance data in a user-friendly fashion, a performance dashboard is a full-fledged business information system that is built on a business-intelligence and data-integration infrastructure.

Performance dashboards translate an organization’s strategy into objectives, metrics, initiatives and tasks that are customized to each group and individual in the organization. They help to proactively improve decisions and optimize processes. Wayne Eckerson explains how to best utilize performance dashboards to optimize business results²:

- Performance dashboards translate an organization’s strategy into objectives, metrics, initiatives and tasks that are customized to each group in the organization.
- A performance dashboard is effective only when a business has clearly defined its mission, values, vision, goals and objectives, metrics and targets, and plans and initiatives.
- Performance dashboards display performance indicators, which are metrics that measure how well business activity is executed by comparing results to a strategic goal.

The strategic dashboard seems very easy and straightforward. But developing effective strategic dashboards is not intuitive. A strategic dashboard involves many dimensions like metrics, audience, data capacity, stakeholders, design, process, accountability and effectiveness. Properly designed and implemented strategic dashboards can provide strategic insights and improve decision-making. While there are no silver bullets, the key point is to remember what Einstein said and pay attention to what we are counting in a dashboard and count well.

References

¹ *Few, S. (2006). Information Dashboard Design: The Effective Visual Communication of Data. O'Reilly Media.*

² *Eckerson, W. W. (2006). Performance Dashboards: Measuring, Monitoring, and Managing Your Business. Hoboken, NJ: Wiley.*

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