

How to Create Measurement Dashboards That Communicate PR's Business Value



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Katie Delahaye Paine:

Helping communications professionals define and measure success for 30 years.

- Founder of:
 - The Delahaye Group (now Cision)
 - KDPaine & Partners (now Carma)
 - Paine Publishing
- Author of:
 - *Measuring the Networked Nonprofit*
 - *Measure What Matters*
 - *Measuring Public Relationships*
 - *50 Shades of PR ROI*
 - *Measurement 101*



Paine Publishing:

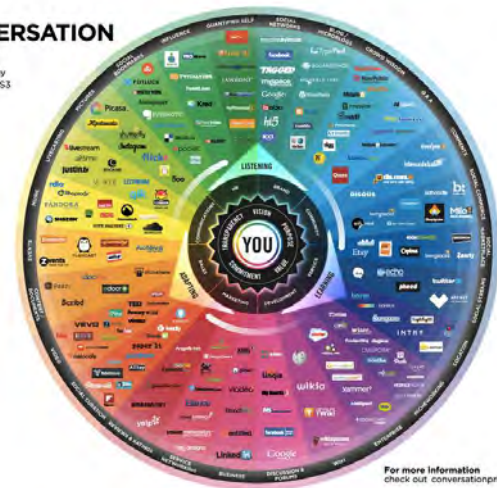
Providing communications professionals the knowledge and information they need to navigate the journey to great measurement.

- The 4 Pillars of Paine Publishing
 - Education
 - Training
 - Consulting
 - Publishing

What has changed in communications?

- ▶ Big data raises false hopes
- ▶ Measurement is no longer an option
- ▶ Impressions are **not** sales or awareness
- ▶ Everyone is “media”
- ▶ Sentiment is overrated
- ▶ It's not about the media, it's about your mission & what your stakeholders do with the info when you put it out there
- ▶ The Barcelona Principles

THE CONVERSATION PRISM
Brought to you by
Brian Solis & JESSIE



For more information
check out conversationprism.com

The Barcelona Principles, The Conclave & Industry Standards

- 1) Goal Setting and Measurement are Fundamental to Communication and Public Relations
- 2) Measuring Communication Outcomes is Recommended Versus Only Measuring Outputs
- 3) The Effect on Organizational Performance Can and Should Be Measured Where Possible
- 4) Measurement and Evaluation Require Both Qualitative and Quantitative Methods
- 5) AVEs are not the Value of Communication
- 6) Social Media Can and Should be Measured Consistently with Other Media Channels
- 7) Measurement and Evaluation Should be Transparent, Consistent and Valid

- 1 Content & Sourcing
- 2 Reach & Impressions
- 3 Engagement & Conversation
- 4 Opinion & Advocacy
- 5 Influence
- 6 Impact & Value

Conclave members:



All standards are available on:
<http://painepublishing.com/standards-central-2/>

The Coalition

The Coalition published, tested, and validated standards for:

- 1 Definition of an Item of Content
- 2 Circulation
- 3 Mentions
- 4 Sentiment
- 5 Quality Elements

The Conclave

The Conclave published standards for:

- 1 Content & Sourcing
- 2 Reach & Impressions
- 3 Engagement & Conversation
- 4 Opinion & Advocacy
- 5 Influence
- 6 Impact & Value

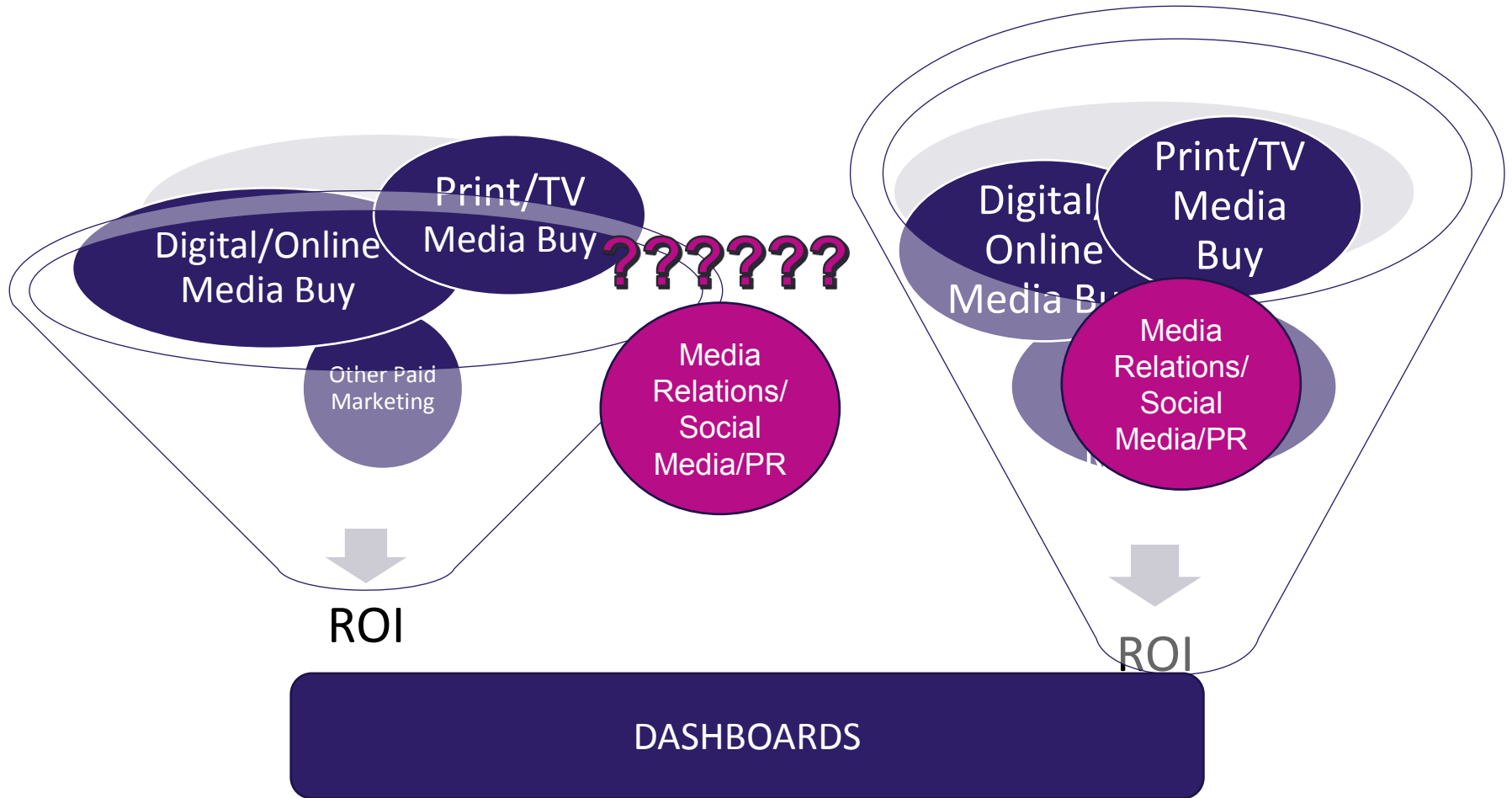
For more info go to www.smmstandards.com

Silos are obsolete

- ▶ Customers who are fully engaged represent an average 23% premium in terms of share of wallet, profitability, revenue, and relationship growth over the average customer
- ▶ Companies that engage both their employees and their customers gain a 240 percent boost in performance-related business outcomes
- ▶ There is no external & internal its all communications
- ▶ There is barrier between social and traditional



We need a new Attribution Model



6 Steps to a Dashboard Leadership will Love to Success

Step 1: Define your goal

What outcomes is this strategy or tactic going to achieve? What are your measurable objectives?

Step 2: Define the parameters

Who are you are trying to reach? How do your efforts connect with those audiences to achieve the goal?

Step 3: Define your benchmarks

Who/what are you going to compare your results to?

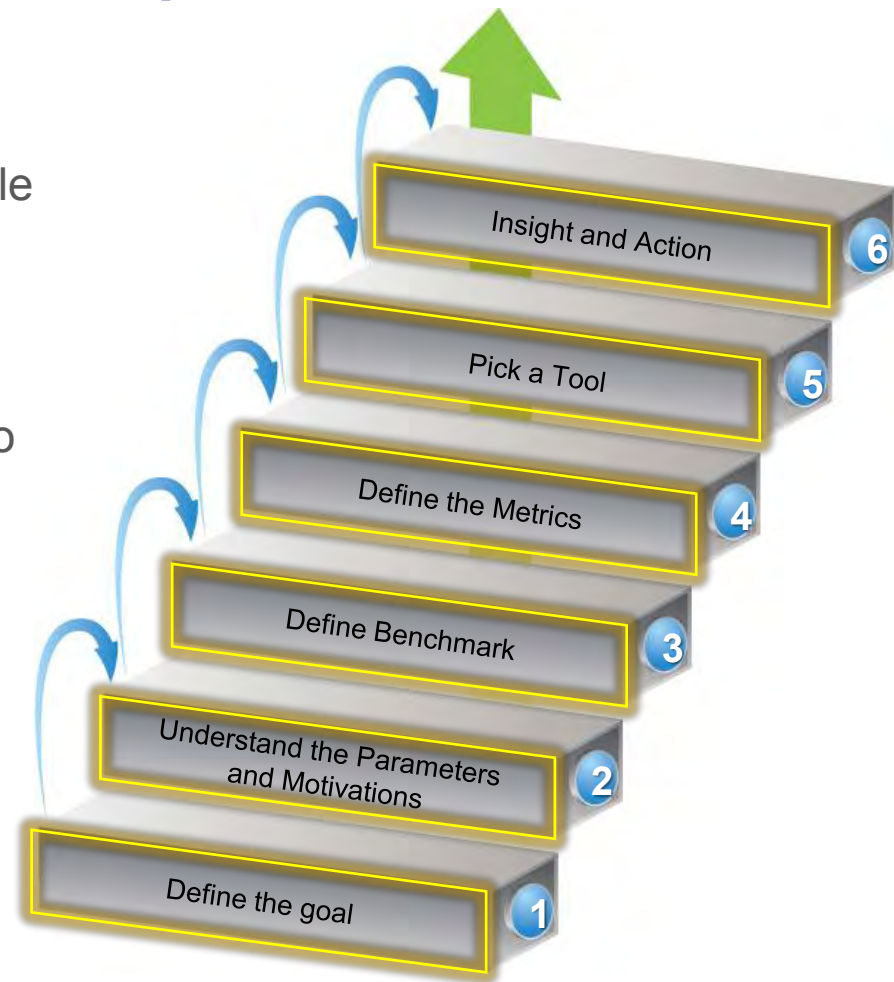
Step 4: Define your metrics

What are the indicators to judge your progress?

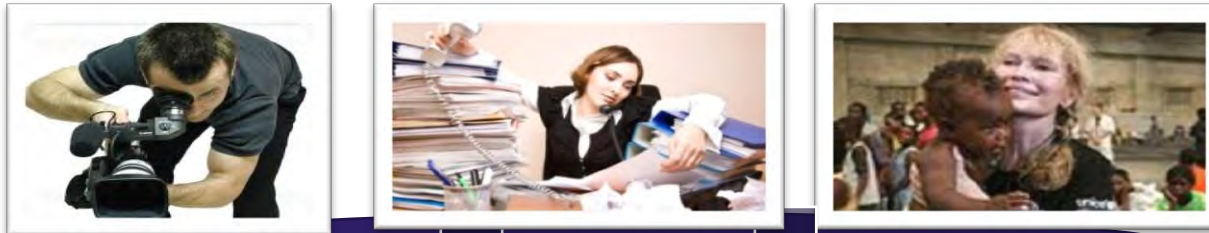
Step 5: Select your data collection tool

Step 6: Analyze your data.

Turn it into action, measure again!



Step 1: Define the Goals



How does what you do
contribute to the bottom

line?

Outtakes (Intermediary Effects)

- Awareness
- Knowledge/Education
- Understanding

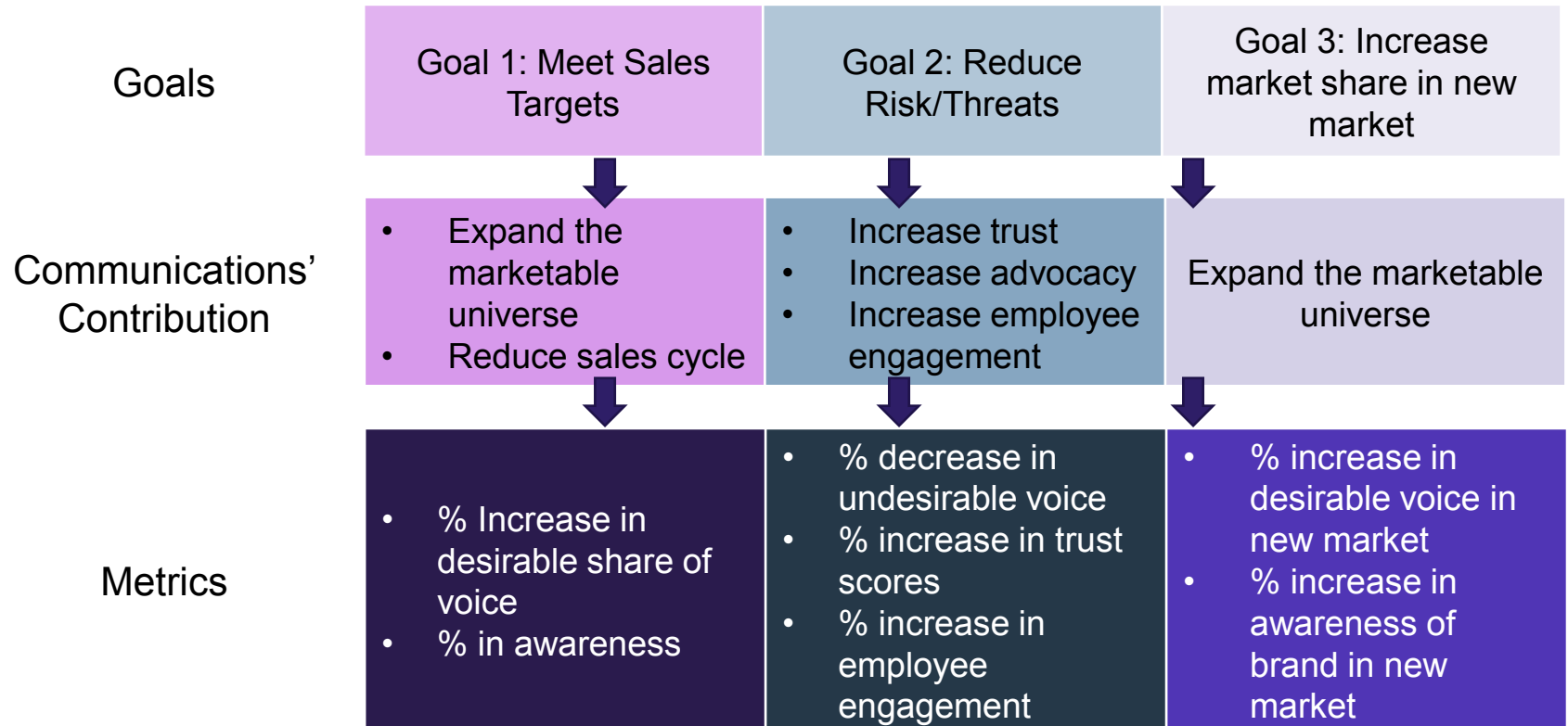
Outcomes (Target Audience Action)

- Revenue
- Leads
- Engagement
- Advocacy

What's your champagne moment?



Goals & Suggested Metrics



Step 2: Understand the parameters

- ▶ What are management's priorities?
- ▶ Who are you are trying to reach?
- ▶ How do your efforts connect with those audiences to achieve the goal?
- ▶ What influences their decisions?
- ▶ What's important to them?
- ▶ ...What makes them act?



Goal: Get the cat to stop howling

Strategy: Buy cat food

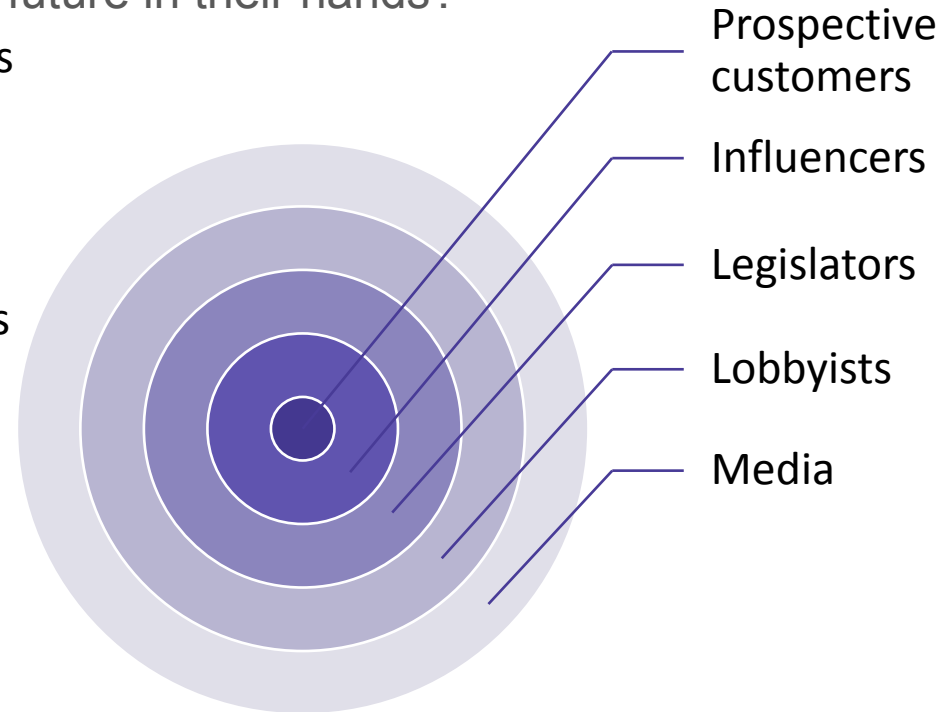
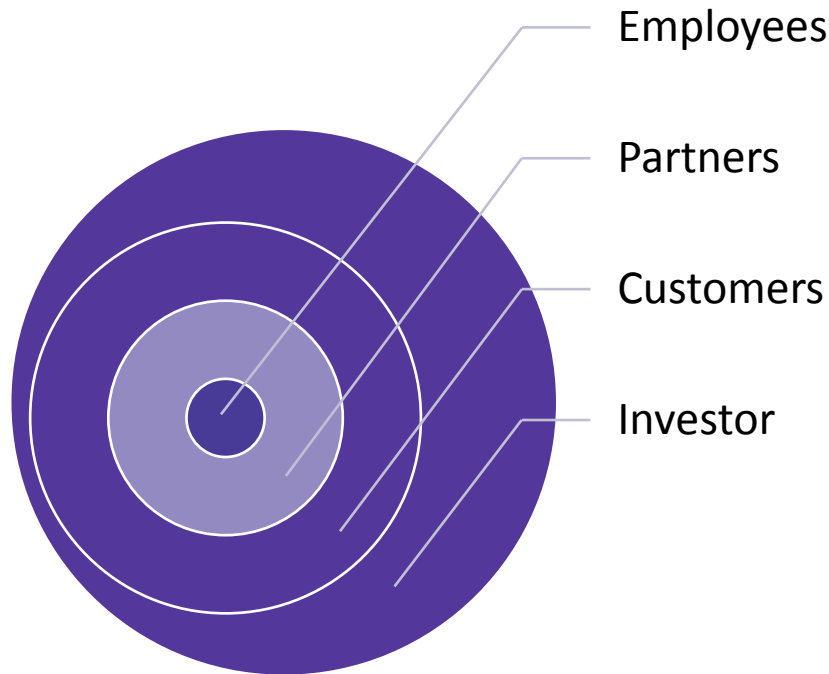


Options: Local? Cheap? Convenient?



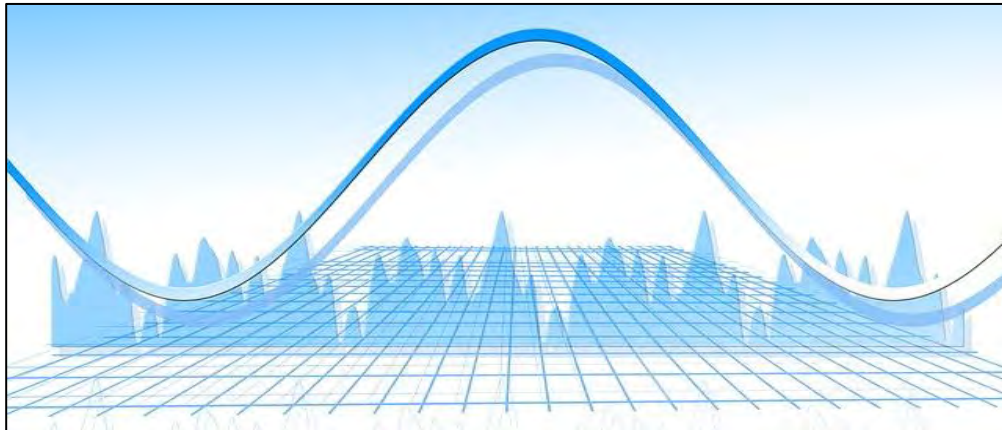
Step 2B: Understand the Stakeholders

- ▶ Who are the stakeholders that hold your future in their hands?



Step 3: Establish Benchmarks

- ▶ Past performance over time
 - Measurement is a comparative tool
- ▶ Peers/Competitors
- ▶ Whatever keeps leadership awake at night



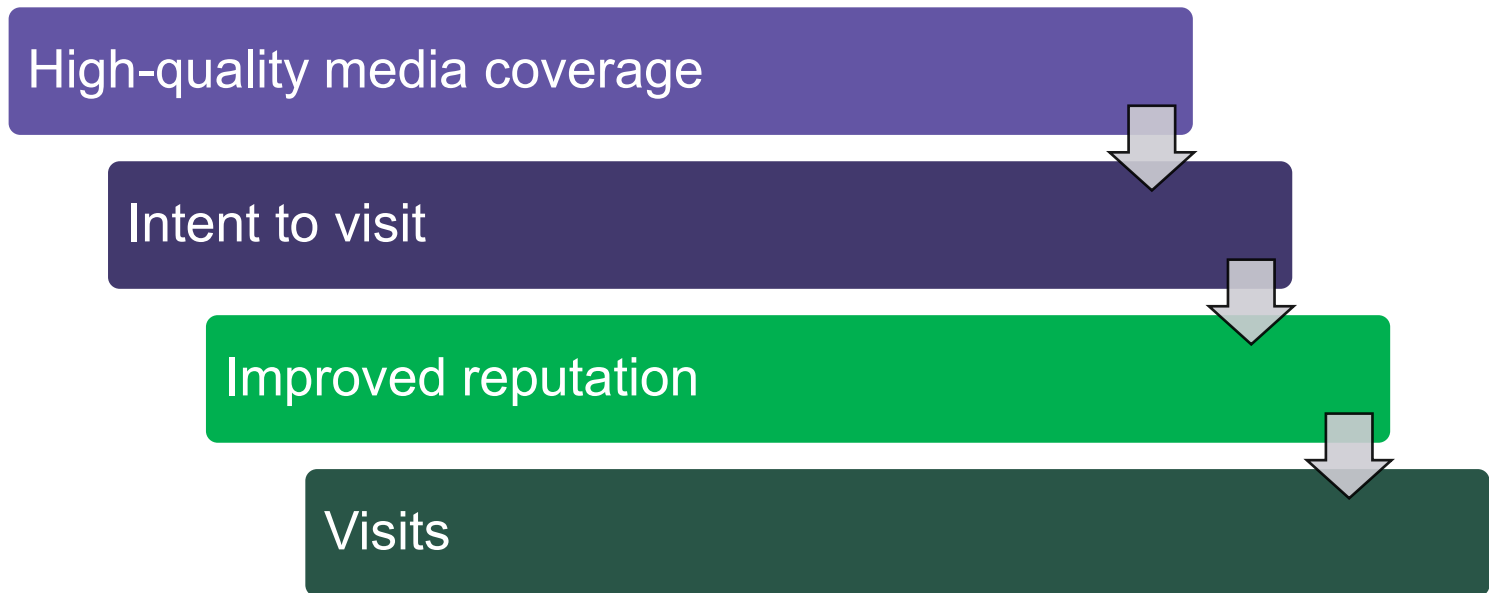
Step 4: Define your Kick Butt Index

- ▶ You become what you measure, so pick your metrics carefully
- ▶ The Perfect KBI
 - ▶ Is actionable
 - ▶ Is there when you need it
 - ▶ Continuously improves your processes & gets you where you want to go



Definitions of “Success”

- ▶ Workshop defined the criteria
- ▶ All criteria linked back to the goals:



Kick Butt Quality Score

| Desirable Criteria | Score | Undesirable Criteria | Score |
|---|--------------|---|--------------|
| Contains a key message | 3.50 | No key message | -1.0 |
| Contains a desirable visual | 0.75 | Negative message, negative myth reinforced | -3.0 |
| Contains a quote from a spokesperson | 2.50 | Contains a competitor quote | -1.0 |
| Positions your brand as best in class | 0.75 | A story or a headline that leaves the reader less likely to do support the organization | -3.0 |
| Dispels a myth | 0.75 | Organization omitted from story that includes competitors mentioned | -2.0 |
| The story or headline leaves a reader more likely to support the organization | 1.75 | | |
| Total | 10.00 | | -10.0 |

Social Media Engagement Index

| Action | Score |
|--|-----------|
| “Like”/Follow/Opens/+1 | 0.5 |
| Favorite or Opens or Views | 1 |
| Comment | 1.5 |
| Share content | 2 |
| Signs up to receive email or other owned content | 2.5 |
| Shares a link to an owned site | 2.5 |
| Total | 10 |

24

Elements in an Employee Engagement Index

| Element | Score |
|---|-----------|
| More likely to invest discretionary time | 0.5 |
| More likely to recommend to family & friends as a great place to work | 1 |
| Greater understanding of organizational mission vision & values | 1.5 |
| Greater understanding of key organizational messages | 2 |
| Lower retention rate | 2.5 |
| Lower recruitment costs | 2.5 |
| Total | 10 |

24

Step 5: Pick the Right Measurement Tools

- ▶ If you want to measure messaging, positioning, themes, sentiment:

Content analysis

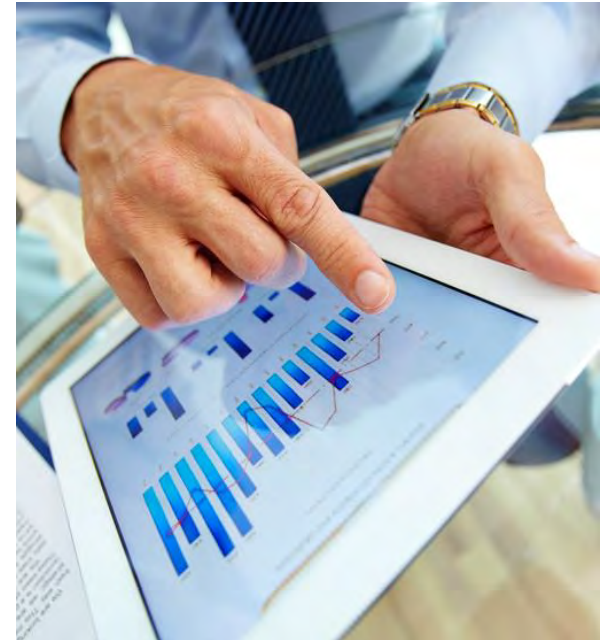
- ▶ If you want to measure awareness, perception, relationships, preference:

Survey research

- ▶ If you want to measure engagement, action, purchase:

Web analytics

- ▶ If you want predictions and correlations you need two out of three

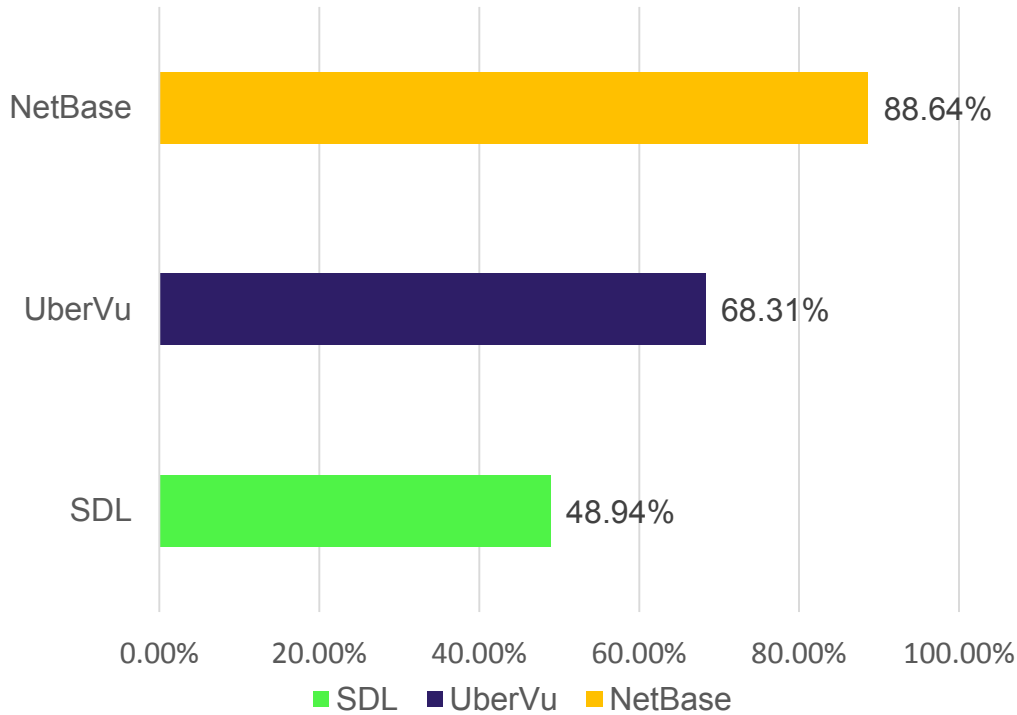


Goals Determine Tools

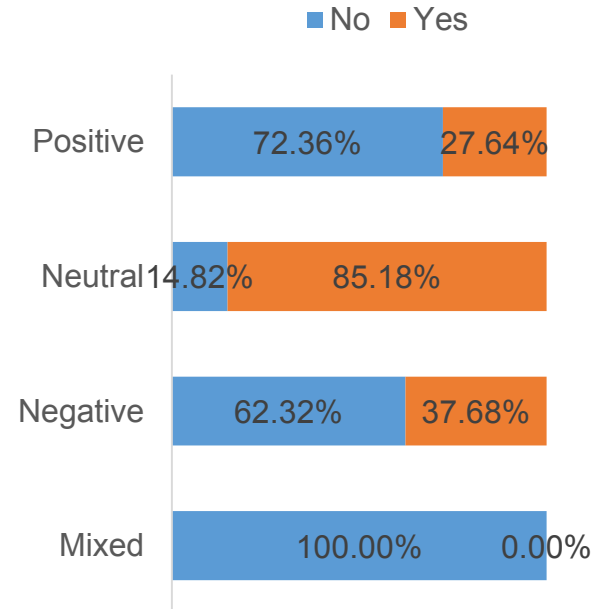
| Communications' Role | Interim Metric | Outcome Metric | Tools Required |
|--|--|--|---|
| Increase understanding of key messages | Increase in % of quality coverage | % increase in understanding | Media Quality Analysis Qualitative Survey |
| Enlarge & improve relationships with NGOs & other influencers | % increase in share of influencer voice | % improvement in relationships with influencers | Media Content Analysis Relationship Survey |

Testing the Accuracy of Coding

% Agreement with human coding



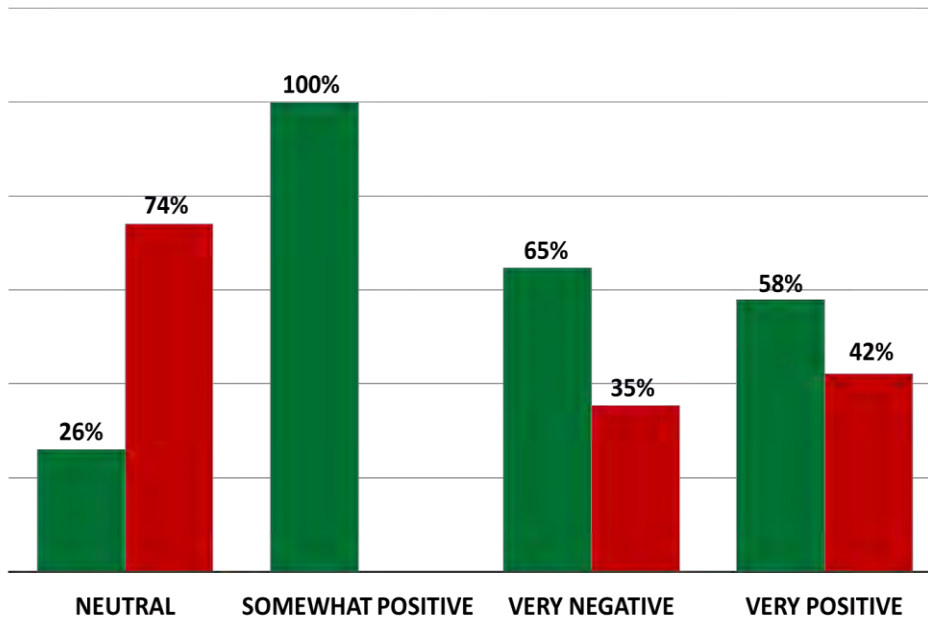
Degree to which agreement occurred



Testing Validity of Criteria

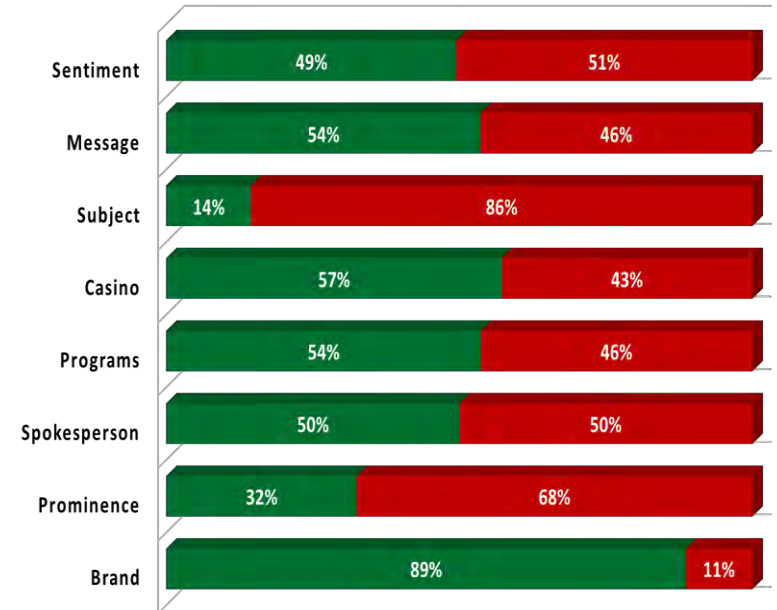
Intercoder Reliability of Sentiment

■ Yes ■ No



Intercoder Reliability of Key Metrics

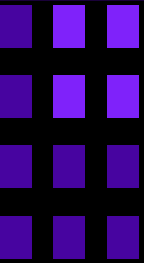
■ Yes ■ No



Step 6: Be Data Informed, not Data Driven

- ▶ Rank order results from worst to best
- ▶ Ask “So What?” at least three times
- ▶ Put your data into an overall framework consistent with C-Suite expectations
- ▶ Find your “Data Geek” (or someone who is)
- ▶ Compare to last month, last quarter, 13-month average

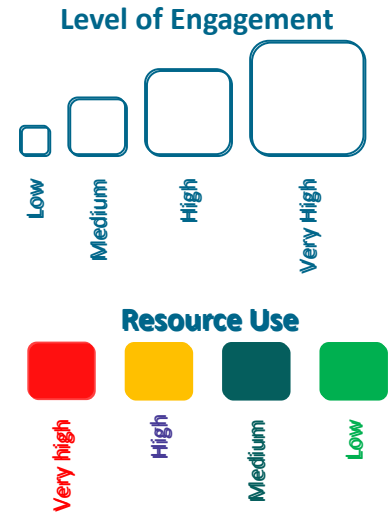
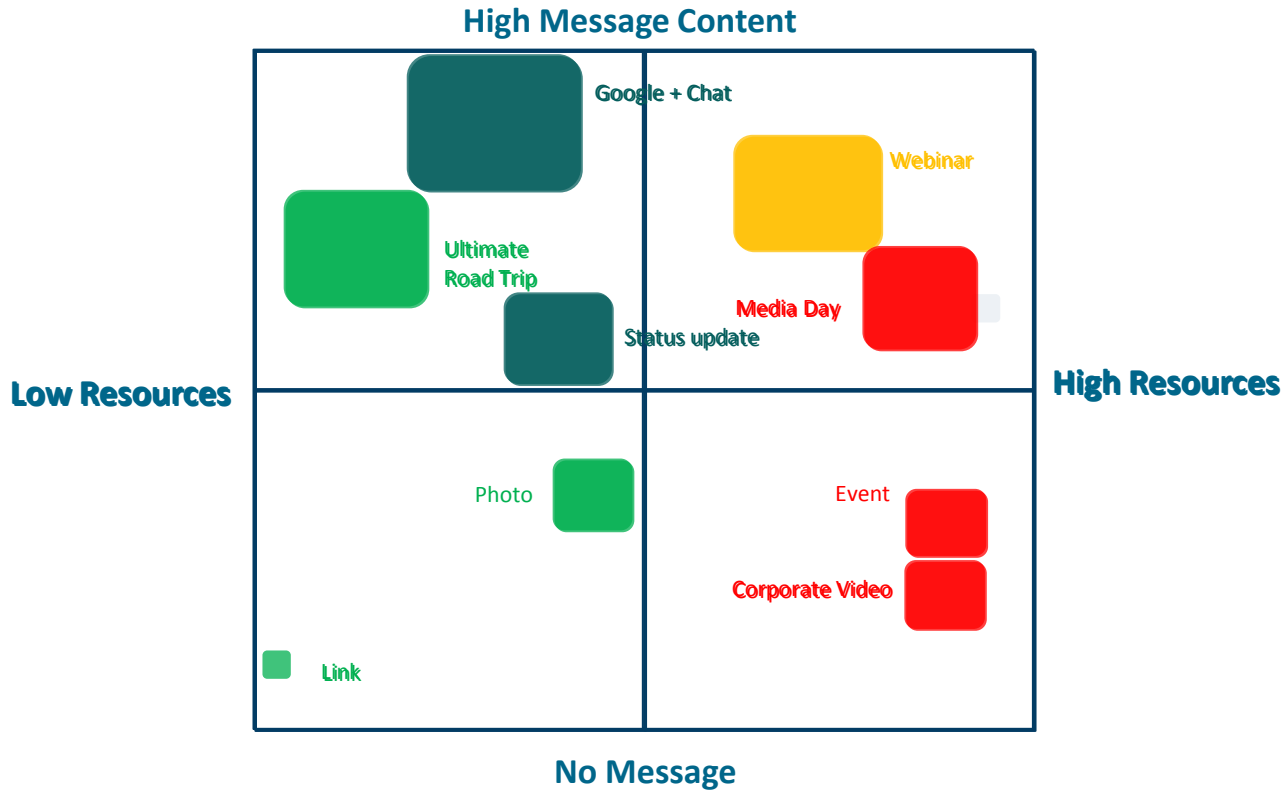




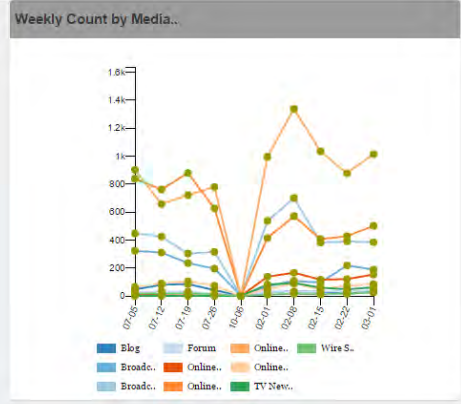
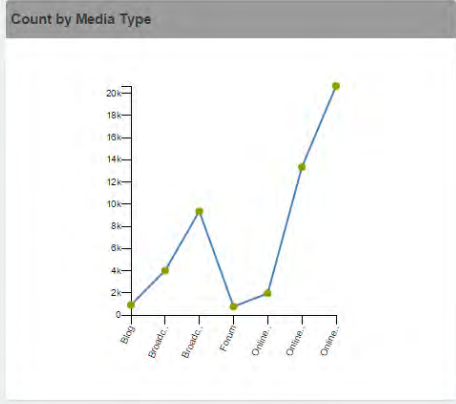
Examples



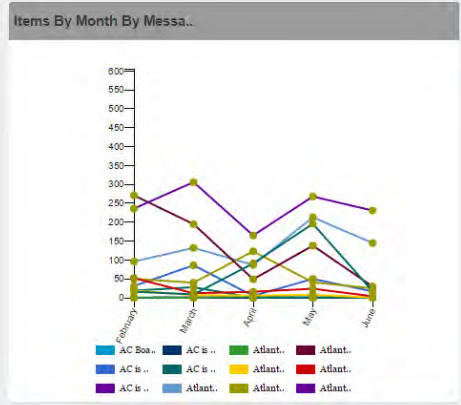
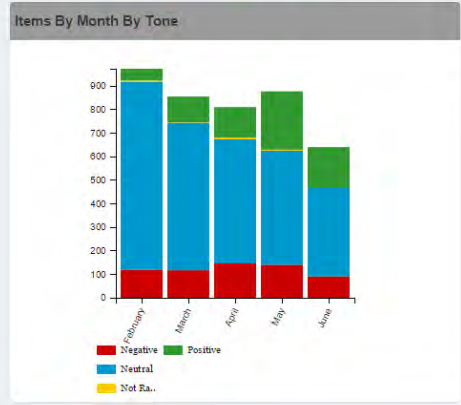
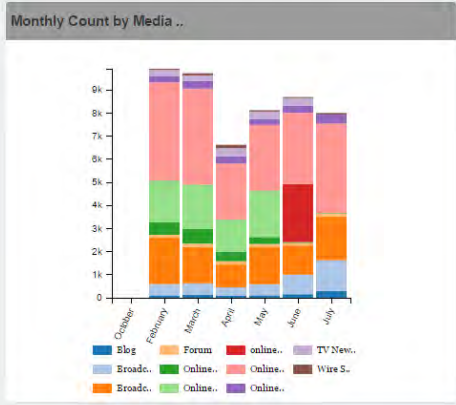
Advocacy vs. Resource Use



- ★ Profiles +
 - ★ Coder Profile
 - ☆ Social Media
 - ☆ Europe Profile
 - ☆ Social Campaign
 - ☆ Joint Intro
 - ☆ Pinterest Trial
 - ☆ SnapChat
- Folders +
- 📧 Newsletters +



Keywords Map



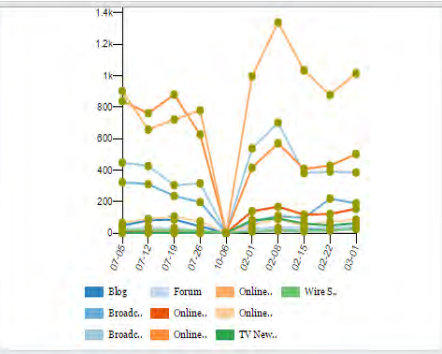
Articles 54778 Results [Add New Article](#)

Options Arrange By: Ascending Descending Search within results

10/06/2015 [Today's Performance Techniques](#)
Bloomberg

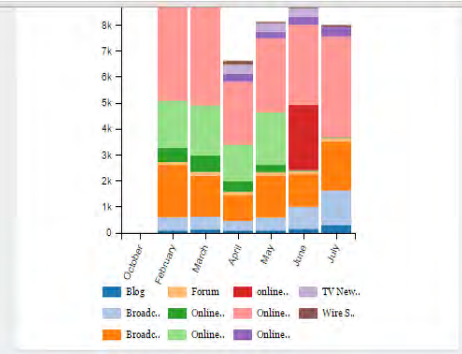
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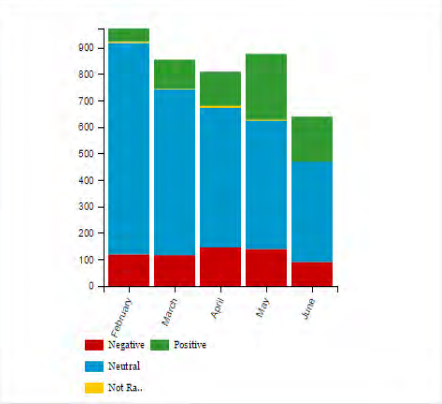


Atlantic City Convention & Casino
Revel Entertainment
h's Resort Atlantic City

Show Us Your Side
 Beachfront Hotels On
 Atlantic City Convention & Victoria Authority



Items By Month By Tone



Articles 54778 Results [Add New Article](#)

Options ▾ Arrange By: Ascending Descending 🔍

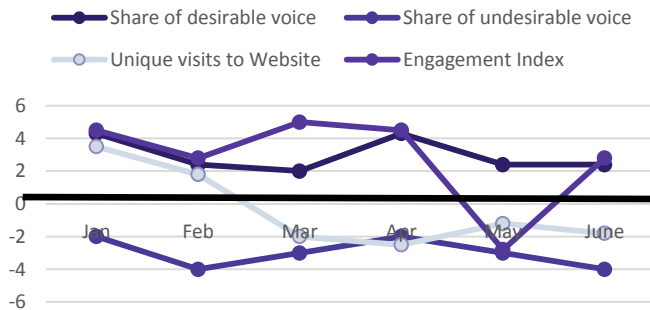
📅 10/06/2015 **Today's Performance Techniques**
 📰 Bloomberg
 🌐 United States 🗣️ English

The items are listed

Overview

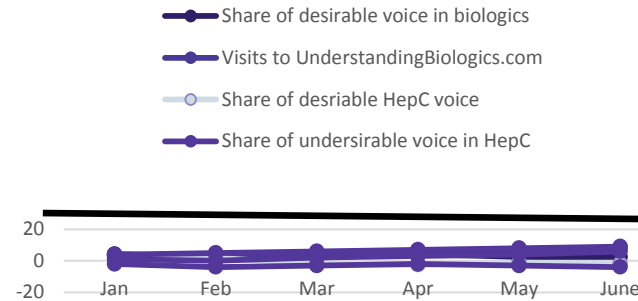
Brand Metrics

% point change since last month



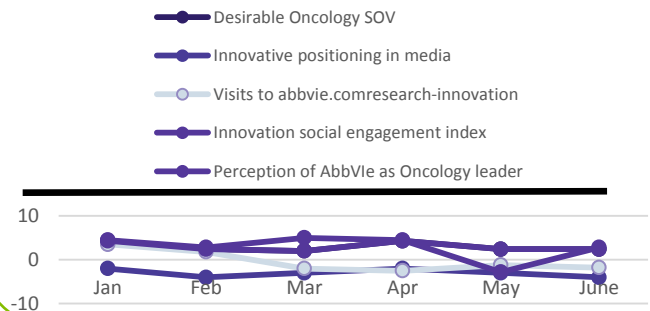
On-Market Products

% point change since last month



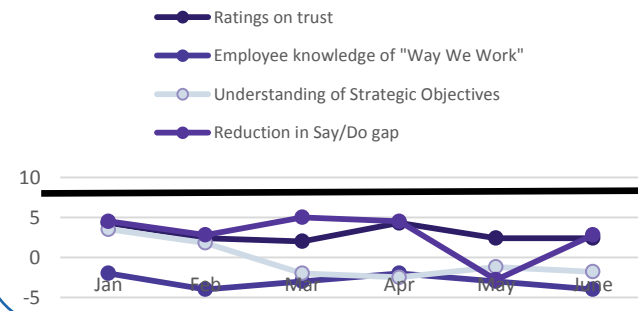
Science & Innovation Metrics

% point change since last month



Culture Metrics

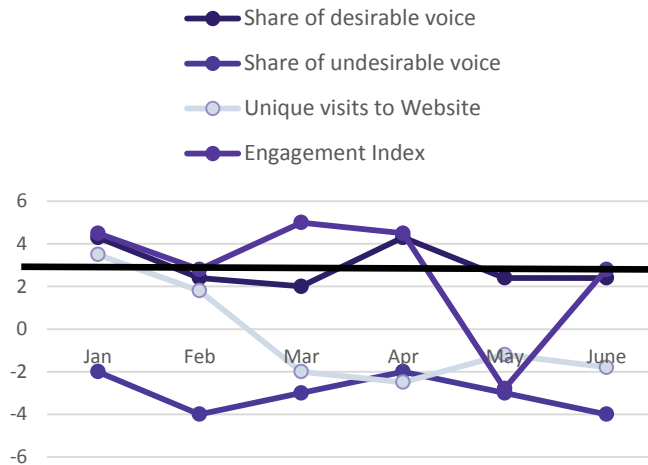
% point change since last quarter



Brand Metrics

| KPI | Last month/period | This Period | Difference |
|-----------------------------|-------------------|-------------|------------|
| Share of Desirable Voice | 10% | 12% | ↑ 2pts |
| Share of Undesirable Voice | 5% | 2% | ↓ 2pts |
| % increase in Unique Visits | 100k | 137K | ↑ 2% |
| Engagement Index | 1357 | 2568 | ↑ 2% |
| % aware | 35% | 37% | ↑ 2pts |
| % familiar | 50% | 52% | ↑ 2pts |
| RMI | 75 | 77 | ↑ 2 |

% point change since last month



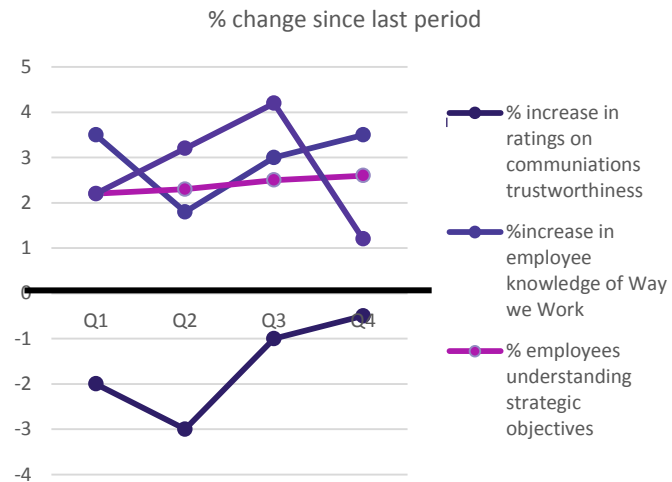
What Worked:

What Didn't:

What We Will Do Next:

Culture Metrics

| KPI | Last quarter | This Period | Difference |
|--|--------------|-------------|------------|
| % increase in ratings on communications trustworthiness | 3% | 5% | ↑ 2pts |
| % increase in employee knowledge of organization "Way we work" | 12% | 14% | ↑ 2pts |
| % employees strongly understanding strategic objectives | 2% | 8% | ↑ 25% |
| % reduction in Say/Do gap on agility metrics | 50% | 48% | ↓ 2pts |



What Worked:

What Didn't:

What We Will Do Next:

Top Line Prototype Dashboard

Generate inbound inquiries

| % increase in conversions & inbound inquiries | | | % increase in inbound inquiries for EIS | | |
|---|------------|--------|---|------------|--------|
| Last Month | This Month | Change | Last Month | This Month | Change |
| 10% | 15% | +5 pts | 10% | 9% | -1 pts |

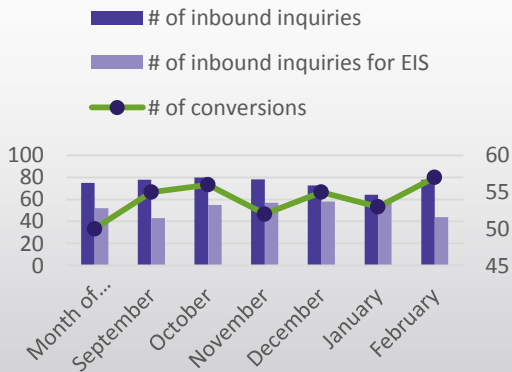
Facilitate user adoption of resources

| % increase in conversions from Comms activities | | |
|---|------------|--------|
| Last Month | This Month | Change |
| 10% | 15% | +5 pts |

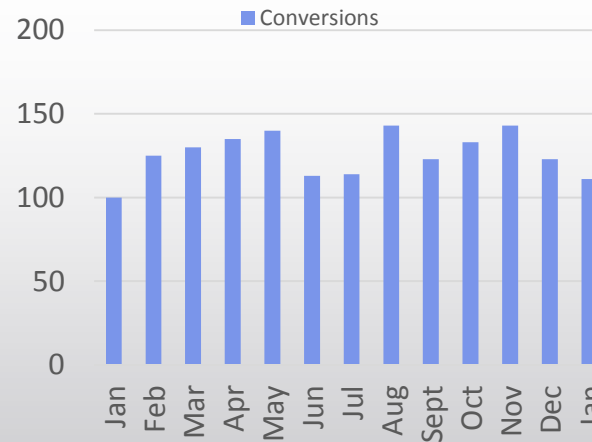
Establish ourselves as a reputable thought leader in the education insurance market

| % increase in a recommend | | | % increase in a preferring | | | % increase in a consideration | | | % increase in awareness | | | % increase MQI | | |
|---------------------------|------------|--------|----------------------------|------------|--------|-------------------------------|------------|--------|-------------------------|------------|--------|----------------|------------|--------|
| Last Month | This Month | Change | Last Month | This Month | Change | Last Month | This Month | Change | Last Month | This Month | Change | Last Month | This Month | Change |
| 10% | 15% | +5 pts | 10% | 15% | +5 pts | 10% | 15% | +5 pts | 10% | 15% | +5 pts | 3 | 5 | +2 pts |

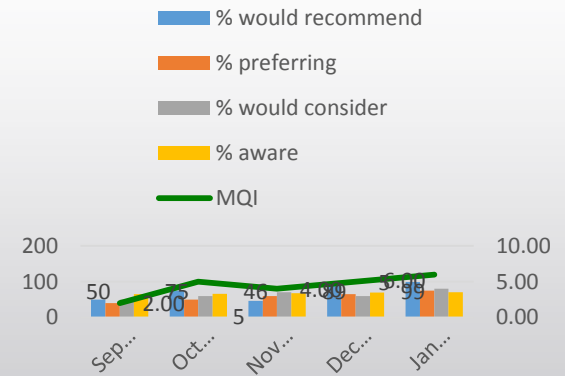
Inbound Inquiries Over Time By Product



Conversions Over Time



Perceptions vs Media Impact Over Time



Business Development Dashboard

% increase in conversions & inbound inquiries

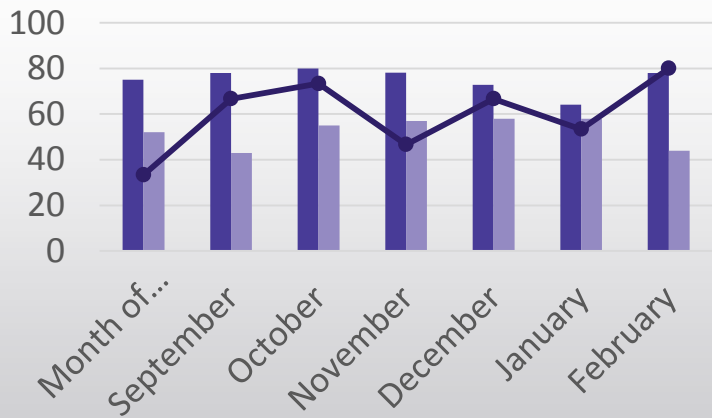
| Last Month | This Month | Change |
|------------|------------|--------|
| 10% | 15% | +5 pts |

% increase in inbound inquiries for EIS

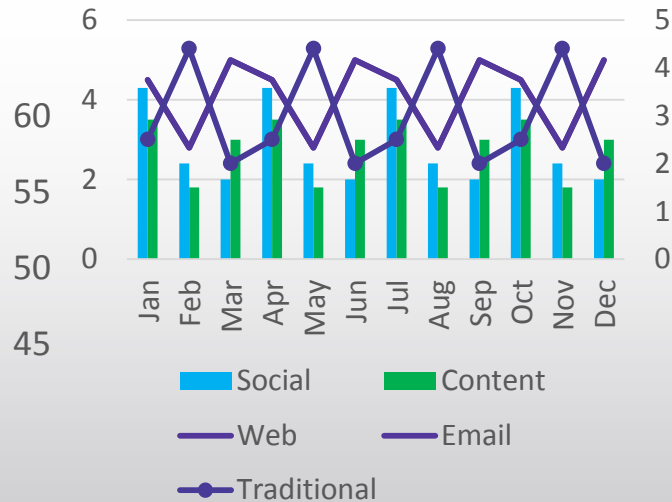
| Last Month | This Month | Change |
|------------|------------|--------|
| 10% | 9% | -1 pts |

Inbound Inquiries Over Time By Product vs Conversions

■ # of inbound inquiries



Conversions Over Time By Source



What happened?

What we did:

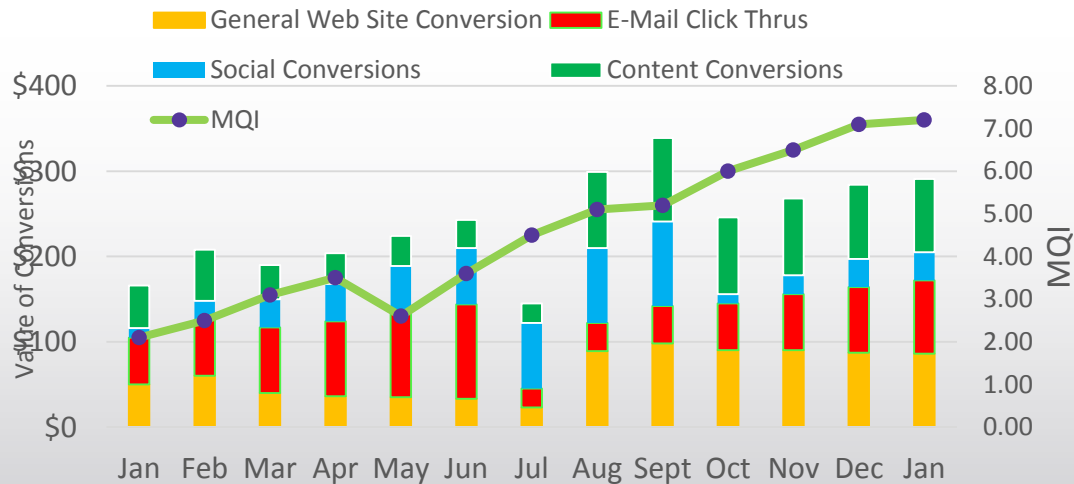
What we will do next:

Engagement Dashboard

% increase in conversions from Comms activities

| Last Month | This Month | Change |
|------------|------------|--------|
| 10% | 15% | +5 pts |

Conversion by Source Over Time Relative to Media Quality



What happened?

What we did:

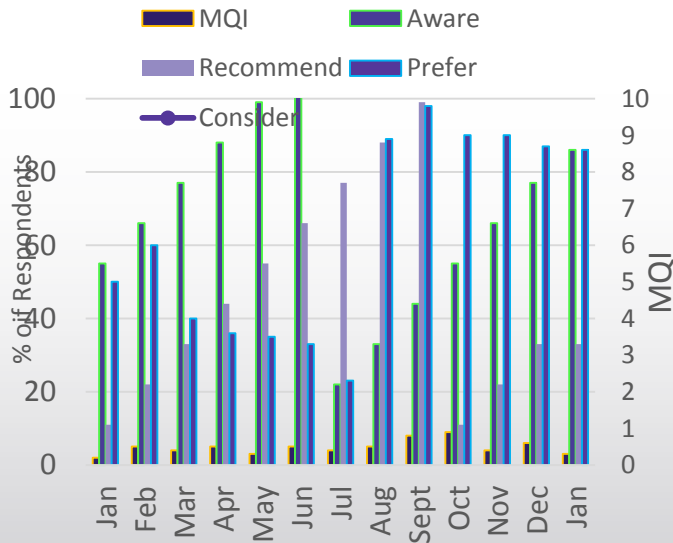
What we will do next:

Reputation/Image Management Dashboard

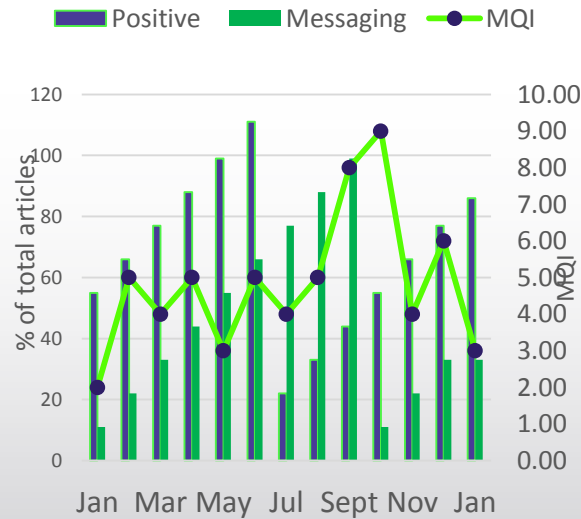
| Perception Survey Changes (Quarterly) | | | | | | | | | | | |
|---------------------------------------|-----|--------|--------|-----|--------|----------|-----|--------|-----------|-----|--------|
| Recommend | | | Prefer | | | Consider | | | Awareness | | |
| Q1 | Q2 | Δ | Q1 | Q2 | Δ | Q1 | Q2 | Δ | Q1 | Q2 | Δ |
| 10% | 15% | +5 pts | 10% | 15% | +5 pts | 10% | 15% | +5 pts | 10% | 15% | +5 pts |

| Media Image Changes (Monthly) | | | | | | | | | | | |
|-------------------------------|-----|--------|-----------|-----|--------|------------|-----|--------|-------------------|-----|--------|
| MQI | | | Messaging | | | % Positive | | | Social Engagement | | |
| Q1 | Q2 | Δ | Q1 | Q2 | Δ | Q1 | Q2 | Δ | Q1 | Q2 | Δ |
| 10% | 15% | +5 pts | 10% | 15% | +5 pts | 10% | 15% | +5 pts | 10% | 15% | +5 pts |

Change in Perceptions Over Time



Media Quality Over Time



What Happened?

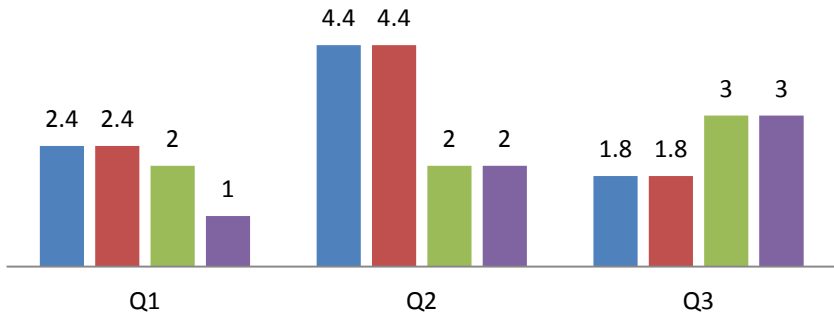
What we did:

What we will do next:

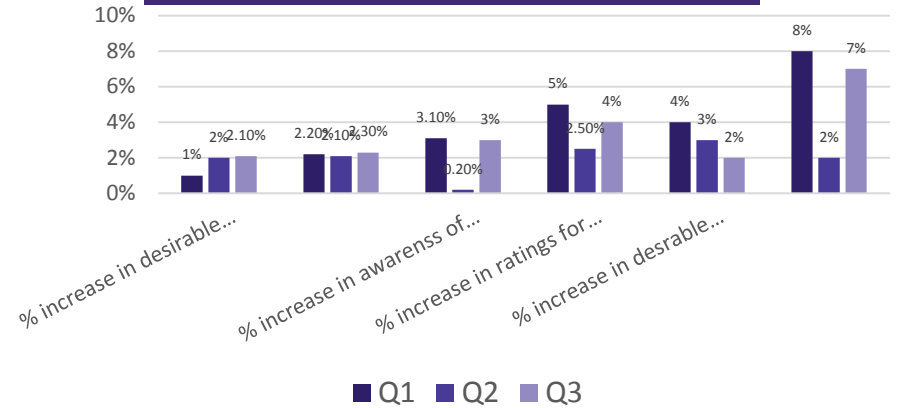
Sample Dashboard

Goal: Raise institutional Profile

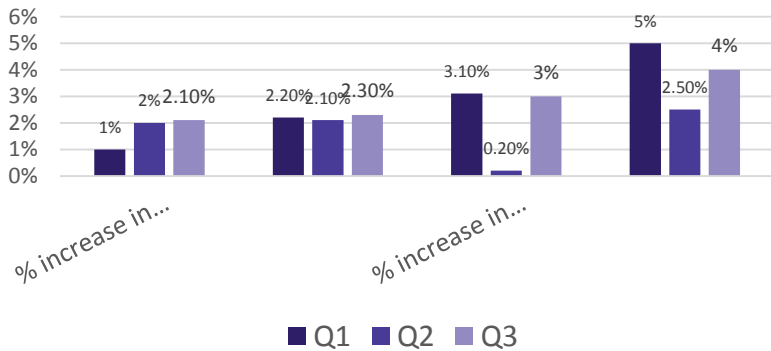
- % items that contain 1+ key messages
- % increase in PBS Share of Voice



Awareness of PBS Content

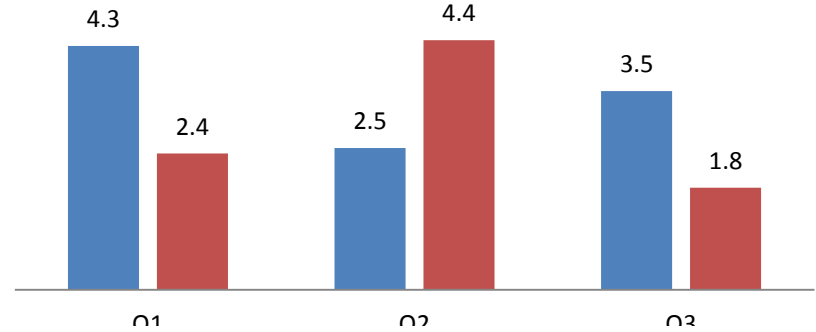


Social Media Engagement



Employee Engagement

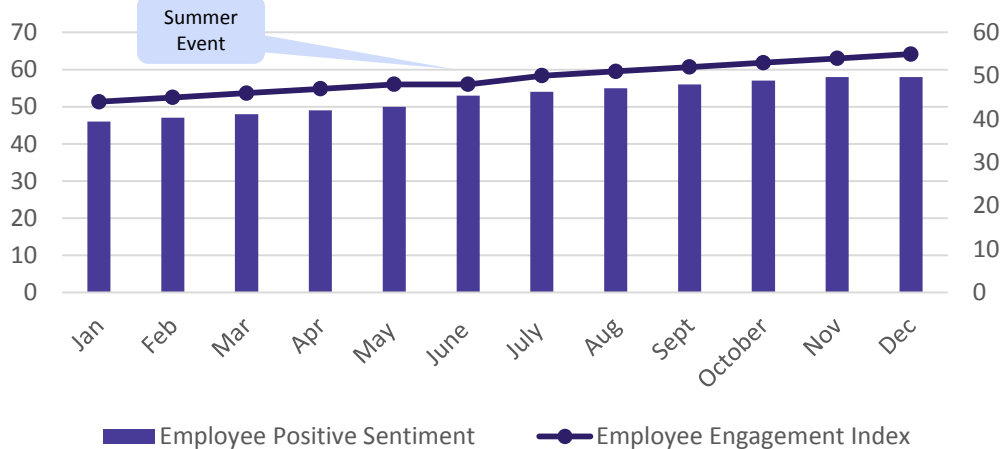
- % increase in click thrus of PBS Scoop



Engage As Owners

Engagement with INTERNAL channels

Employee Engagement vs Sentiment Over Time



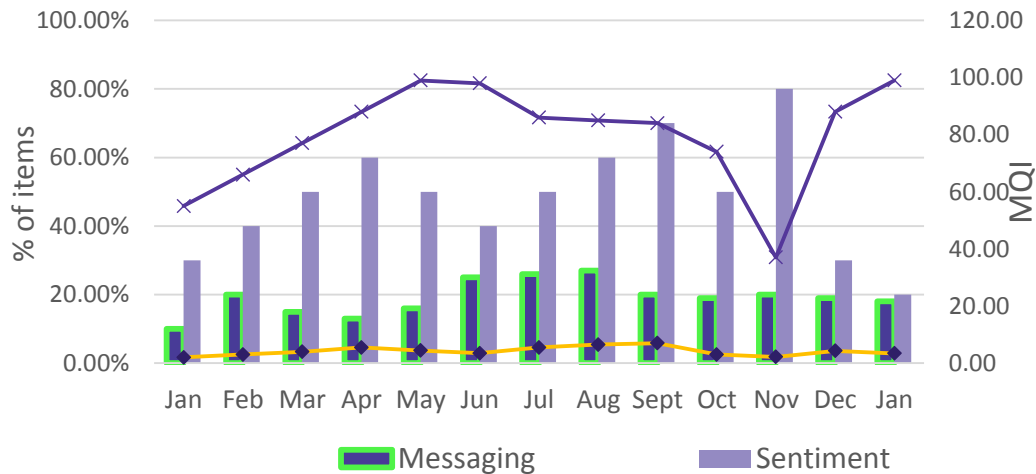
What Happened?

What we did:

What we will do next:

Engagement with EXTERNAL channels

Key Metrics Over Time



Top stories by MQI:

What Happened?

What we did:

What we will do next:



Just how many dashboards do you need to track one Twitter feed?

Dashboard Dos and Don'ts

- ▶ Get consensus on definitions of Success
 - ▶ Measure what matters –how you contribute to the business
 - ▶ Make your metrics tell a story
 - ▶ Make sure your data is valid and accurate
 - ▶ Test any indexes or algorithms with real data before presenting them
- ▶ Don't use metrics that you don't have buy-in for
 - ▶ Don't measure what's easy
 - ▶ Don't clutter up your dashboard
 - ▶ Don't put numbers on it you can't explain
 - ▶ Don't use charts that people can't read or understand

Dos



Don'ts

Thank You!

- ▶ For more resources on measurement, check out Paine Publishing's [Measurement Mall](#)
- ▶ For a copy of this presentation or for any questions, email me: measurementqueen@gmail.com
- ▶ Follow me on Twitter: [@queenofmetrics](#)
- ▶ Follow Paine Publishing on [Facebook](#)
- ▶ Or call me: 1-603-682-0735

