# Measurement Dashboards That Communicate the Business Value of Your Communications Programs

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PR News' PR Measurement Workshop
November 16, 2016
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CEO
Paine Publishing

About Paine Publishing

▶ We provide individuals and organizations with the knowledge and information they need to navigate the journey to high-quality, accurate measurement.

▶ Visit us online: www.PainePublishing.com

The 4 Pillars of Paine Publishing

Education   Training   Consulting   Publishing
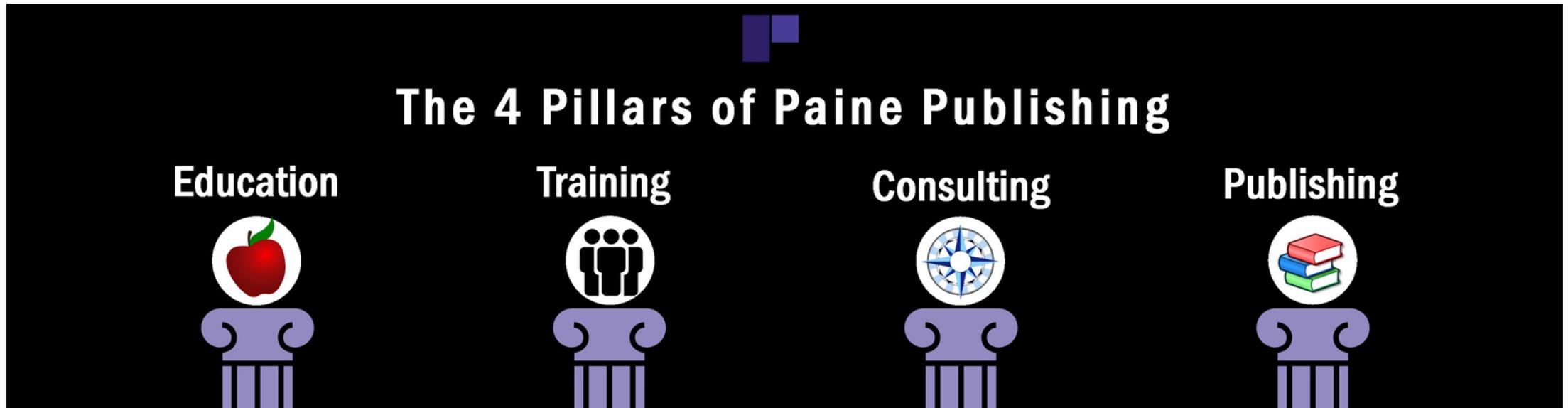
What clients think they want: One system that will justify their budget and answer all their questions.

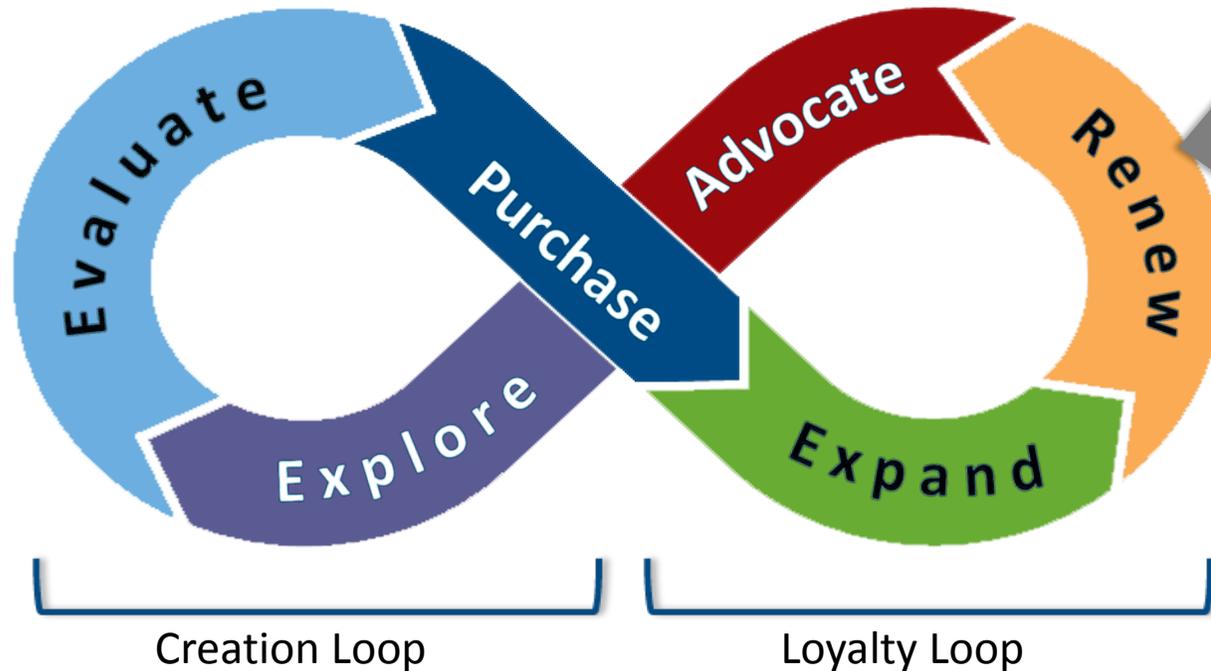**What vendors think that means:** I need media monitoring and some metrics

What the client really needs: Probably three different vendors that need to be integrated into one consistent set of metrics on an interactive dashboard.

Goodbye social/traditional/digital. Hello, Customer Centricity

IDC's Customer Experience Loop

40% of survey participants can track investments by Buyer's Journey Stages

Creation Loop

Loyalty Loop

Source: IDC's 2016 Tech Marketing Benchmarks Study

Integrated Dashboards Are in Your Future

▶ Customer-centric outreach requires communications + marketing to be in sync

▶ Internal communications is critical to external effectiveness

▶ 63.2% of social media teams live within marketing, 6 points higher than last year

▶ Only 4.5% assign social media to PR anymore

Integrated [Metrics]{.underline} Are in Your Future

▶ According to a Conference Board/SNCR study, the results of integrating marketing and communications include:

- ▹ Creating a customer-centric culture
- ▹ Leading to an employee-centric culture
- ▹ Building trust and infusing the business with purpose
- ▹ Improving agility and efficiency
- ▹ Creating a consistent message
- ▹ Aligning goals, metrics, and budgets

Your Goal is to Avoid this:

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

BIG DATA DASHBOARD

ANDERSON FOR eQuest
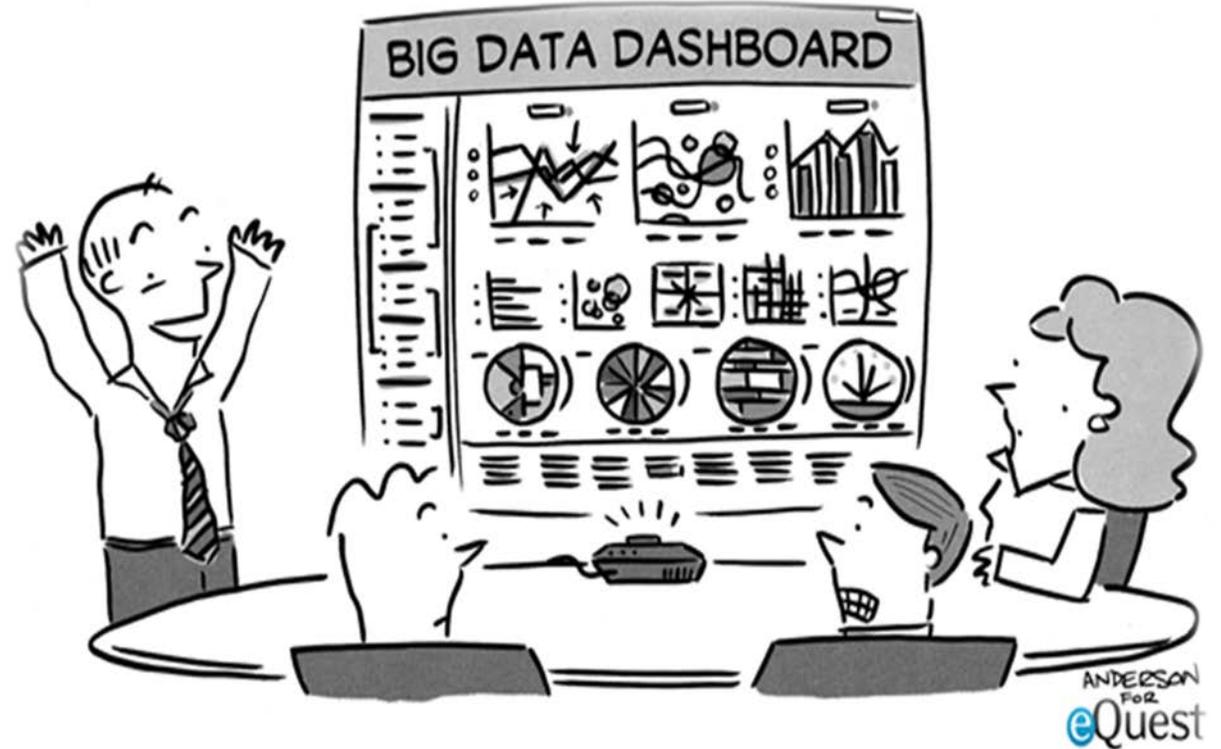
"After careful consideration of all 437 charts, graphs, and metrics, I've deicded to throw up my hands, hit the liquor store, and get snockered. Who's with me?!"
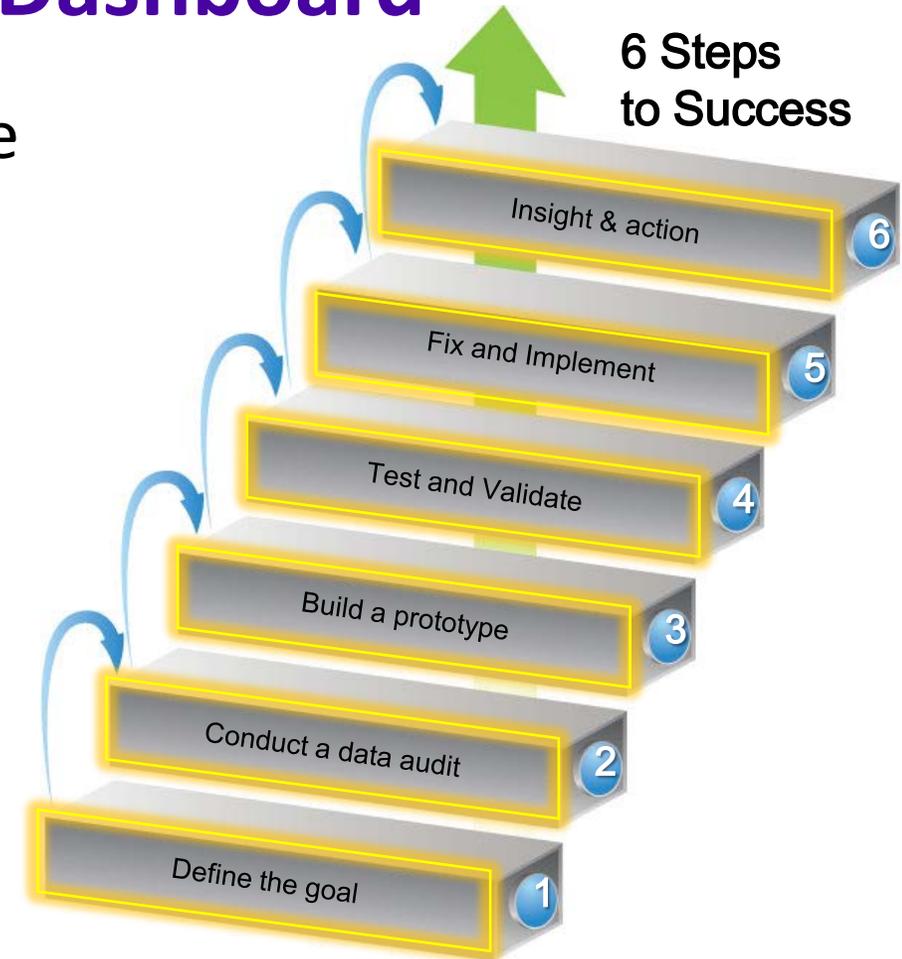
A Good Dashboard Tool is More Than Pretty Charts

▶ Valid data

▶ Easy to find answers to *your* questions

▶ Metrics aligned to goals

▶ Integration of social, traditional, digital, web, survey data, CRM, etc.

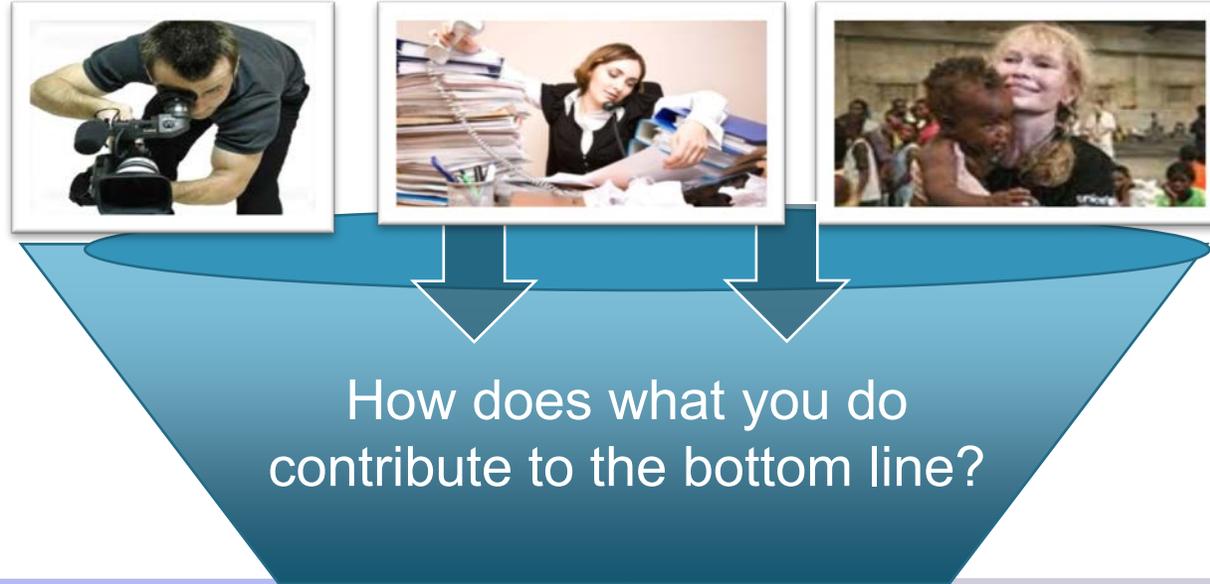▶ Ability to easily find the data and/or stories behind the charts/numbers

6 Steps to the Perfect Measurement Dashboard

► **Step 1: Goals – Get consensus & buy in for the goals & objectives**
  - For the organization
  - For communications

► **Step 2: Audit – what data do you have, what data do you need?**

► **Step 3: Build prototype & get approvals**

► **Step 4: Test and validate**

► **Step 5: Implement**

► **Step 6: Get insight, make decision**

6 Steps to Success

Insight & action — 6

Fix and Implement — 5

Test and Validate — 4

Build a prototype — 3

Conduct a data audit — 2

Define the goal — 1

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

Get Consensus on Goals & Objectives

▶ Set up a meeting to decide:

⯈ What's the definition of "success"?

⯈ What outcomes need to be measured?

For your department or function

⯈ Who will use it?

⯈ Who will maintain it?

⯈ What will it be used for?

For the dashboard itself

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Definitions of "Success"

▸ First: Understand how you contribute to the business or the mission

High-quality media coverage

Improved reputation

Awareness/Engagement/Consideration
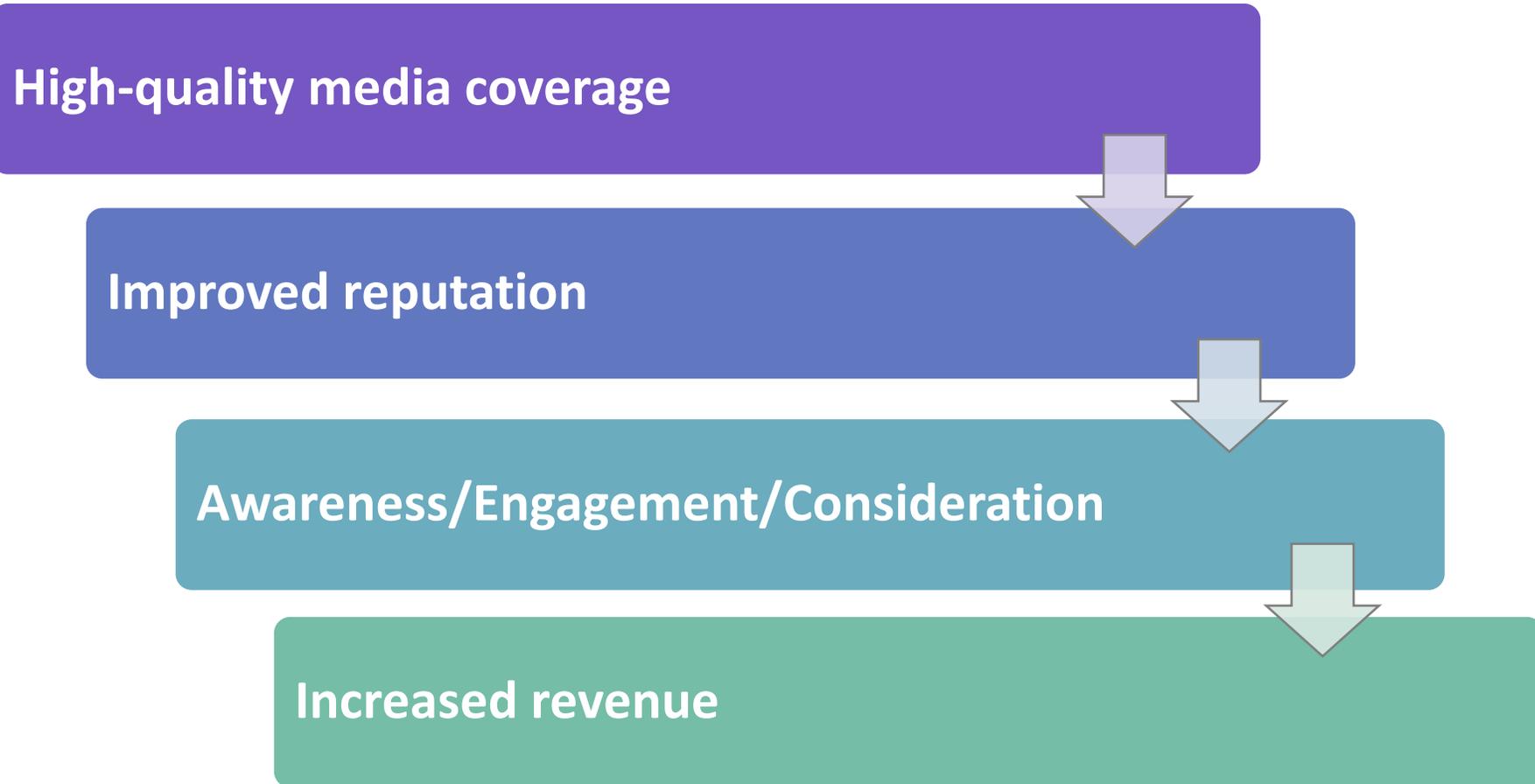
Increased revenue

Objectives

Business Objectives	Comms' Contribution
Increase high quality leads	Increase awareness/ preference
Increase/save revenue	Increase engagement Increase trust

Objectives ➲ Actions

Business Objectives	Comms' Contribution	Comms' Activity
Increase high quality leads	Increase awareness/ preference	Publicity Social Media
Increase/save revenue	Increase engagement Increase trust	Events Content Creation

Objectives ➲ Actions ➲ Metrics

Business Objectives	Comms' Contribution	Comms' Activity	Activity Metric	Outcome Metric
Increase high quality leads	Increase awareness/ preference	Publicity Social Media	• % increase in media quality score • % increase in social sharing	• % increase in awareness/ preference
Increase/save revenue	Increase engagement Increase trust	Events Content Creation	• % increase in attendance • % increase in engagement with content	• % increase in trust • % increase in engagement

Objectives ➲ Actions ➲ Metrics ➲ Tools

Business Objectives	Comms' Contribution	Comms' Activity	Activity Metric	Outcome Metric	Tool
Increase high quality leads	Increase awareness/ preference	Publicity Social Media	• % increase in media quality score • % increase in social sharing	• % increase in awareness/pref erence	• Media content analysis • Social Metrics • Survey Research
Increase/save revenue	Increase engagement Increase trust	Events Content Creation	• % increase in attendance • % increase in engagement with content	• % increase in trust • % increase in engagement	• Survey Research • Web Analytics • Social Metrics

Step 2: The Audit

▶ Who else is using dashboards?

▶ How will you get the data you need?

▶ What sources of data exist?

▶ What technology exists?

▶ What tools are available?

▶ How valid is the data you have?

  ▷ Accuracy tests

  ▷ Validity tests

▶ Who are the experts?

▶ Outsource vs. in-house

Agree on Parameters, Goals & Audiences for Dashboard

- ▶ Who will use it?
- ▶ What decisions do they need to make from the data?
- ▶ What reports do you need to generate?
- ▶ How much drill down and detail do they need?
- ▶ How much time do they have to use and analyze the data?
- ▶ How often?

- ▶ What are you measuring?
  - › Paid/Owned
  - › Earned/Shared
  - › Other marketing activities?
  - › The competition?

Step 3: Implementation

▶ Outsource? In-house?

▶ Who do you need on the team?

▶ Platforms & vendors

  ▹ Content analysis

  ▹ Survey research

  ▹ Web analytics

  ▹ Social analytics

Details, Details, Details…

▶ Benchmarks

▶ Reporting strategies?

▶ Format?

▶ Timing?

▶ Improve the decision-making process

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

Define Media Quality by What Impacts Revenue

Desirable Criteria	Score	Undesirable Criteria	Score
Contains a key message	3.50	No key message	-1.00
Contains a desirable visual	0.75	Negative message, negative myth reinforced	-3.00
Contains a quote from a spokesperson	2.50	Contains a competitor recommendation or call to action	-1.00
Contains a call to action or link	0.75	A story or a headline that leaves the reader less likely to do business with or support the organization	-3.00
Dispels a myth	0.75	Organization omitted from story that includes competitors mentioned	-2.00
The story or headline leaves a reader more likely to do business with or support the organization	1.75		
Total	10.00		-10.00

Define **Engagement** by What Impacts Revenue

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**

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The Perfect Dashboard Platform

▶ Measures messaging, positioning, themes, sentiment via human assisted **content analysis**

▶ Easily incorporates survey research on awareness, perception, relationships, preference

▶ Also measures engagement via social analytics

▶ Includes action and behavior metrics via **web analytics**

Public Affairs Dashboard

- 🔴 Below Target
- 🟡 At Risk
- 🟢 On Target

Sales Target

Increases Brand Awareness, Reduce Sales Cycle 🟡

	Bench-mark	Current	Goal
% increase in share of desirable voice	8.9%	**8.9%** 🟡	10%
% decrease in share of undesirable voice	3.1%	**2.1%** 🟢	<3%
% increase in awareness	11%	**11%** 🟡	13%

Risk Reduction

Increase Trust, Reduce Threats 🔴

	Bench-mark	Current	Goal
% Decrease in undesirable Share of Conversation	10%	**12%** 🔴	8%
% Decrease in stakeholders not aware	21%	**21%** 🔴	7%
% increase in Trust scores	50%	**45%** 🟡	75%

New Market Share

Expand the Marketable Universe 🟡

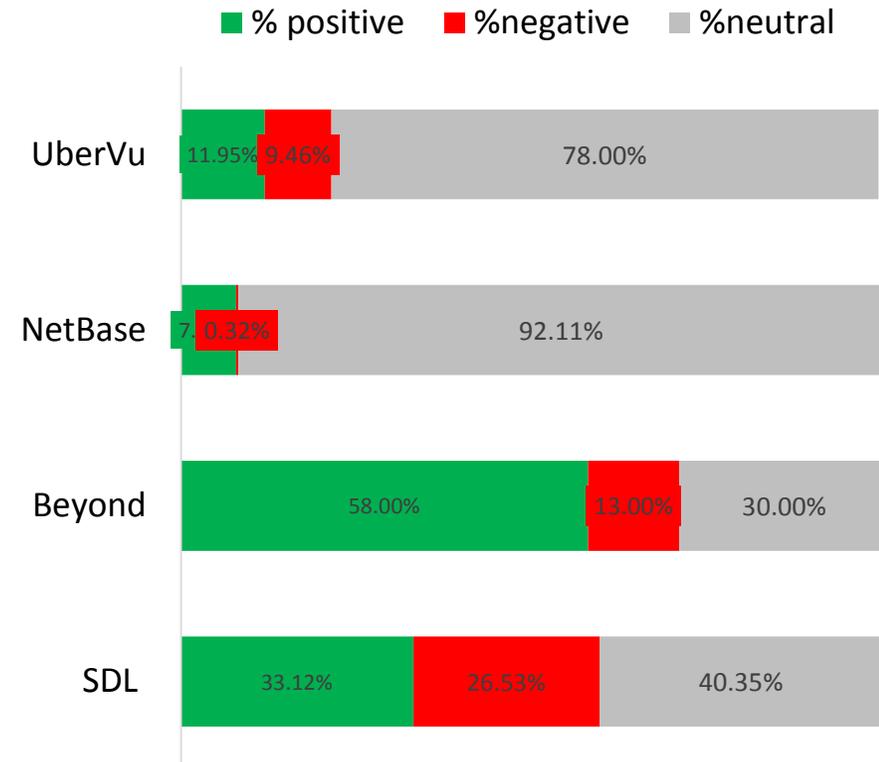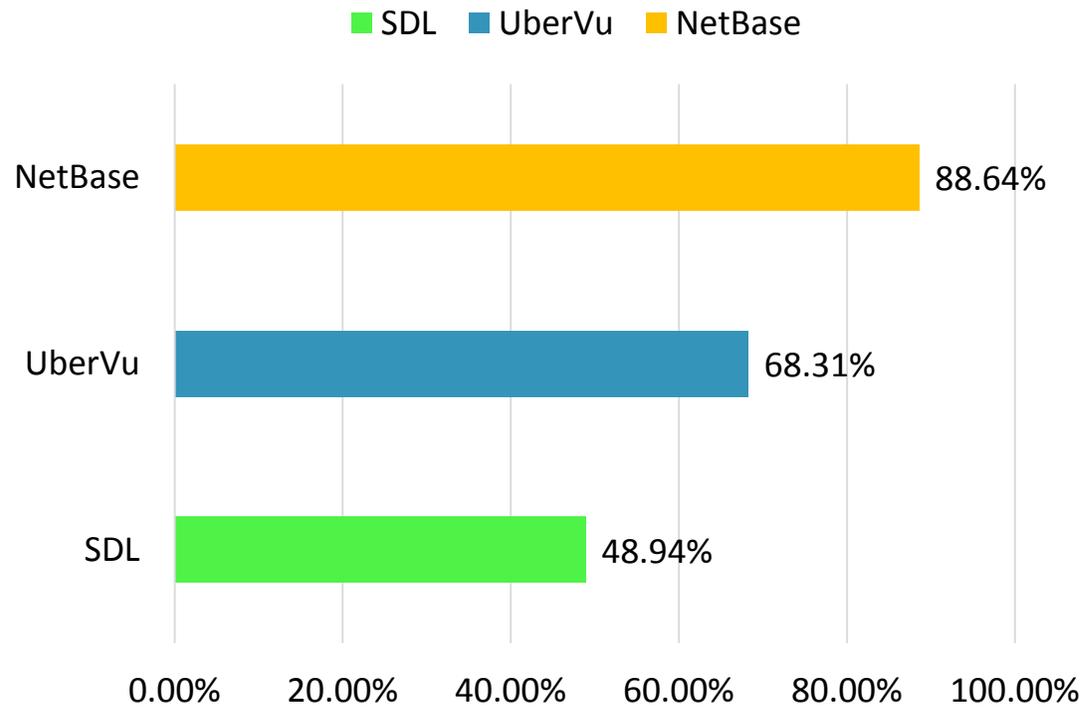|	Bench-mark	Current	Goal
% Increase in stakeholder awareness	10%	**9%** 🟡	20%
% Increase in online engagement on issue	10%	**5%** 🟡	15%
% Increase in in-bound requests for information	0	**100** 🔴	500

Step 4: Test and Validate

% of alerts found

■ SDL ■ UberVu ■ NetBase
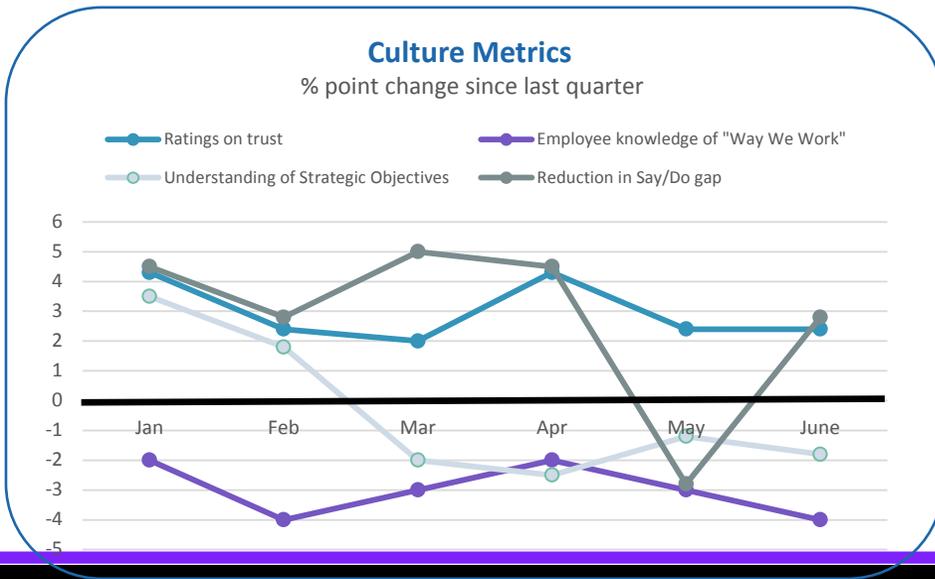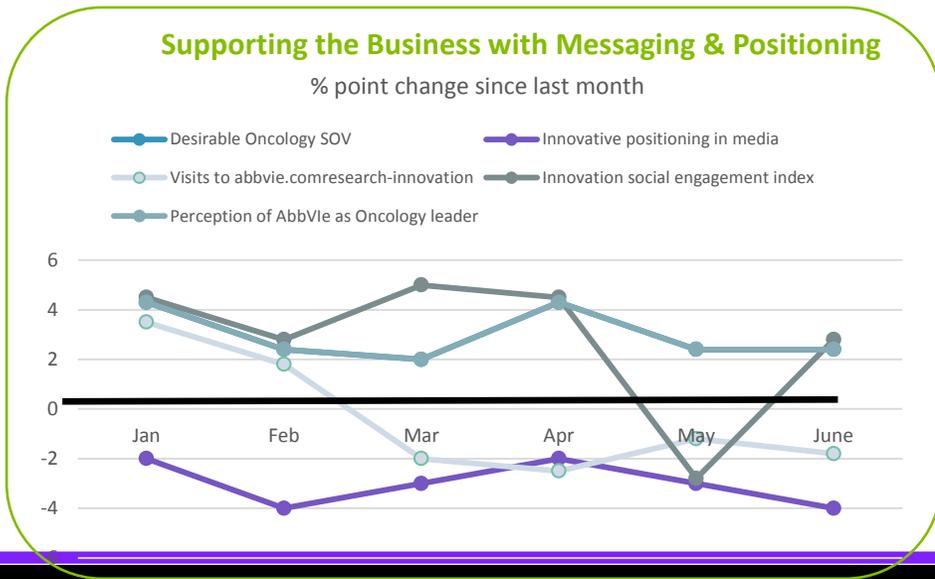
NetBase	17.65%
UberVu	60.00%
SDL	100.00%
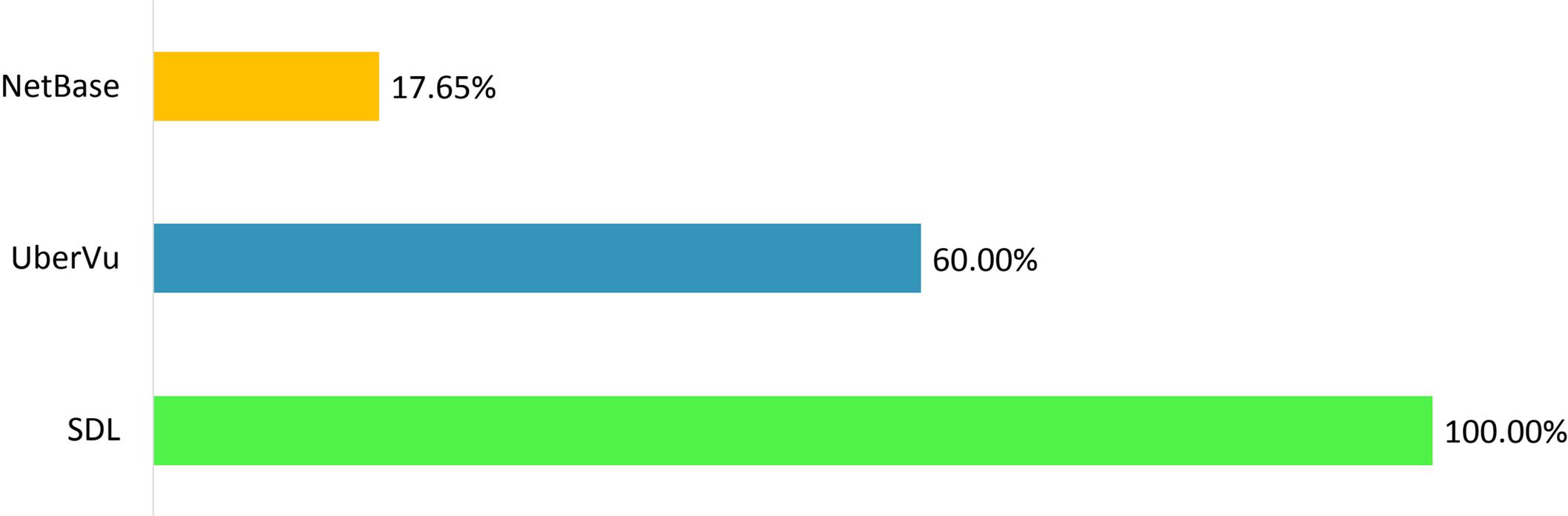
Testing the Accuracy of Coding

% Agreement with human coding

Legend: SDL, UberVu, NetBase

- NetBase: 88.64%
- UberVu: 68.31%
- SDL: 48.94%

Legend: % positive, %negative, %neutral

- UberVu: 11.95% / 9.46% / 78.00%
- NetBase: 7 / 0.32% / 92.11%
- Beyond: 58.00% / 13.00% / 30.00%
- SDL: 33.12% / 26.53% / 40.35%

Overview of Dashboards

Corporate Reputation

% point change since last month

Disease Awareness/Patient Support/Engagement

% point change since last month

Supporting the Business with Messaging & Positioning

% point change since last month

Culture Metrics

% point change since last quarter

Trust Index Over Time

Goal: 80   Baseline Index: 72.46

Trust Among Partners		
% increase in trust index		
Baseline	This Period	Change
72	75	+3 pts

Trust Among Influencers		
% increase in trust index		
Baseline	This Period	Change
72	75	+3 pts

Trust Among Donors	
increase in Trust Index	
This Period	Change
75	+3 pts

Goal: Increase Trust: Baseline Index: 72.46

Trust Among Partners	Trust Among Influencers	Trust Among Donors	Trust Among Beneficiaries (Future)

% increase in trust index			% increase in trust index			% increase in trust index		
Baseline	This Period	Change	Baseline	This Period	Change	Baseline	This Period	Change
72	75	+3 pts	72	75	+3 pts	72	75	+3 pts
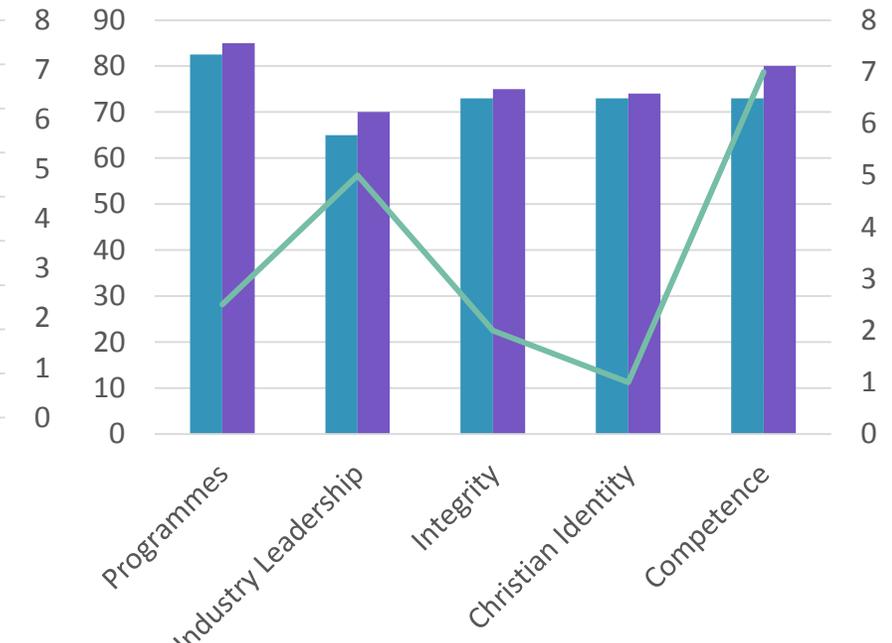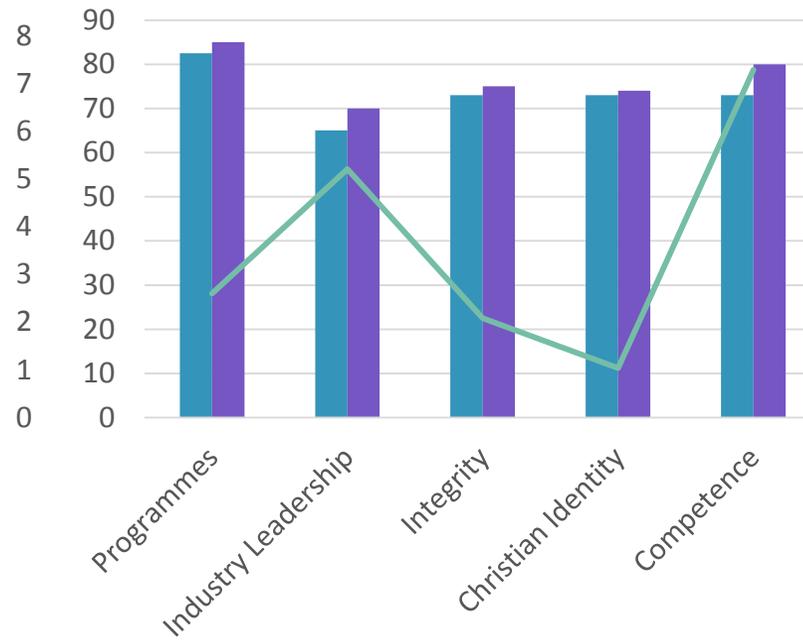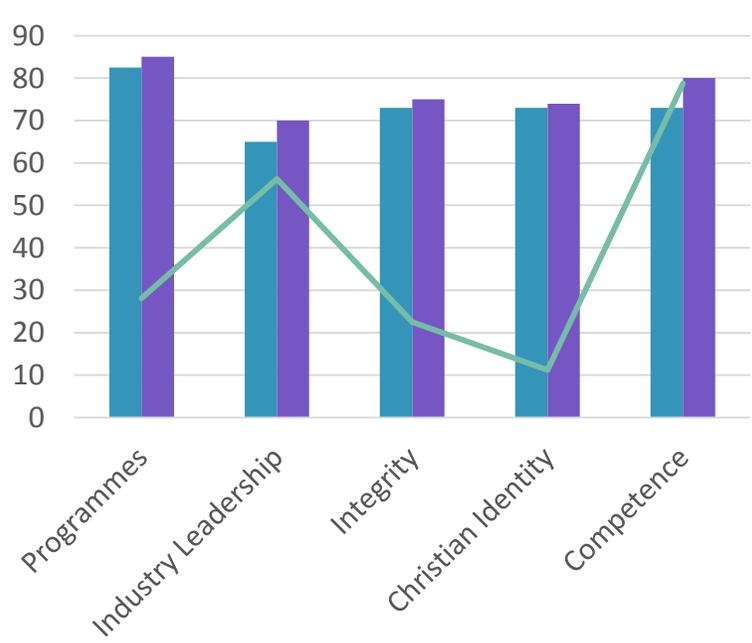
Activity Metrics

%increase in weighted Trust Index and reputation scores (will need to see results to determine the weightings and components)

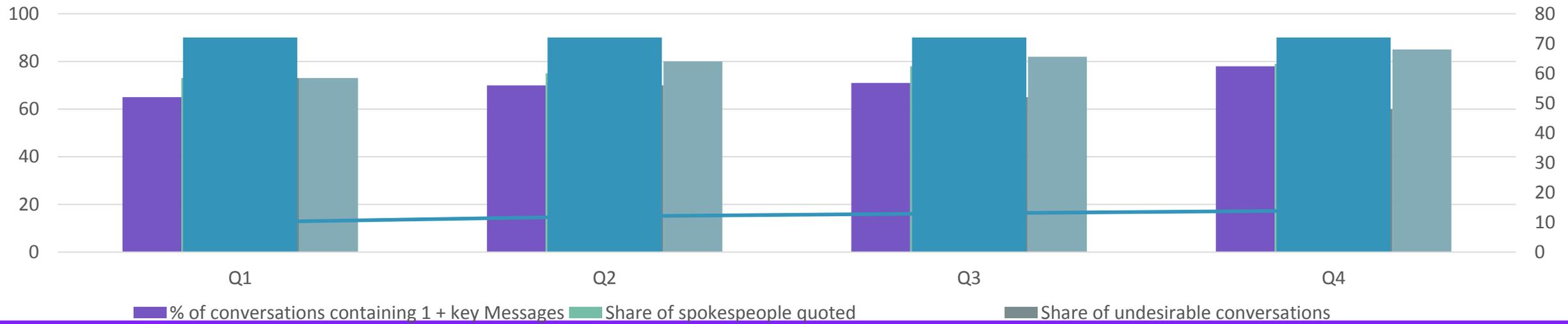% of conversations in traditional and social media (and other content) containig one or more of WVI's key messages.

% WVI spokespeople quoted compared the Save the Children? Or % spokespeople quotes that contain key messages.

% decrease in share of undesirable conversatoins.

% of conversations in traditional and social media (and other content) containig one or more of WVI's key messages and containing a quote from a key spokesperson

% share of endoresements relative to peers or % increase in endorsements

Activity Results Over Time

% of conversations containing 1 + key Messages — Share of spokespeople quoted — Share of undesirable conversations — % conversations containing WVI quote — Weighted Trust Index — # of endorsements

Step 6: Glean Insight

▶ 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

✓*What?*

✓*So what?*

✓*Now what?*

Learn to Love Small Numbers

▶ Your target is not trillions, billions, or even millions

▶ Engagement matters more than impressions

▶ Conversions matter more than clicks

▶ Orders matter more than opens

▶ Trust matters more than sentiment

▶ Influence matters more than reach

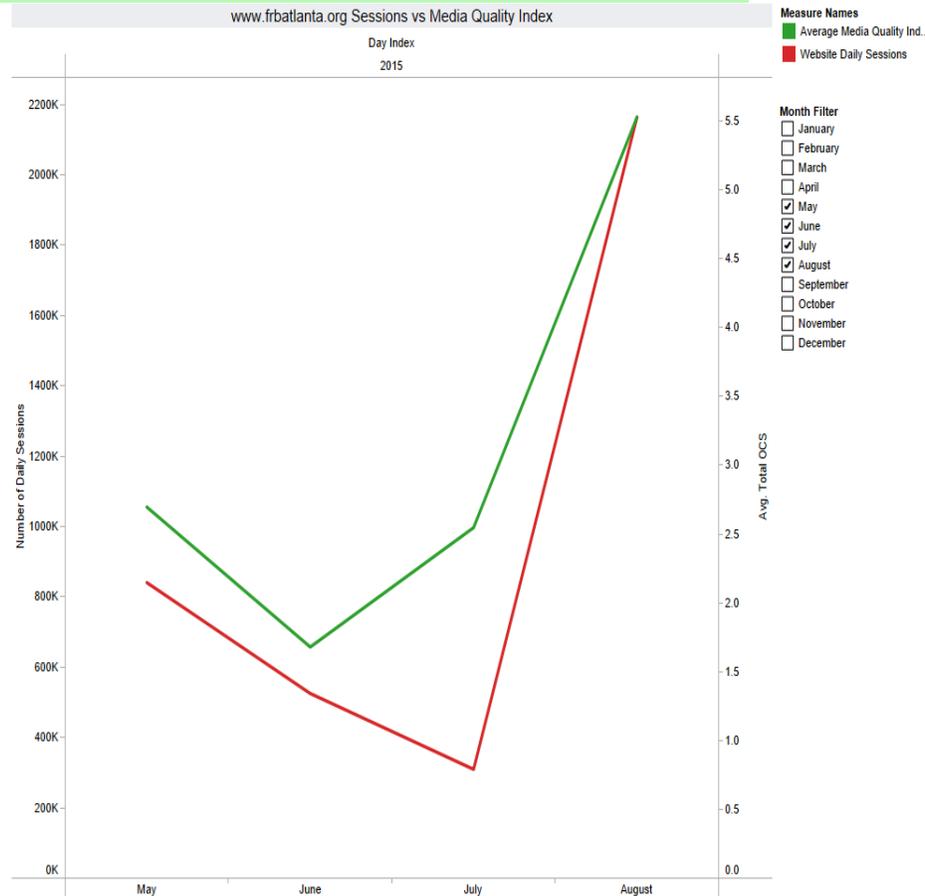# Expect to Fail

▶ Experiment and A/B test constantly

▶ Not everything succeeds

▶ Rank order everything best to worst

▶ Correlate and connect
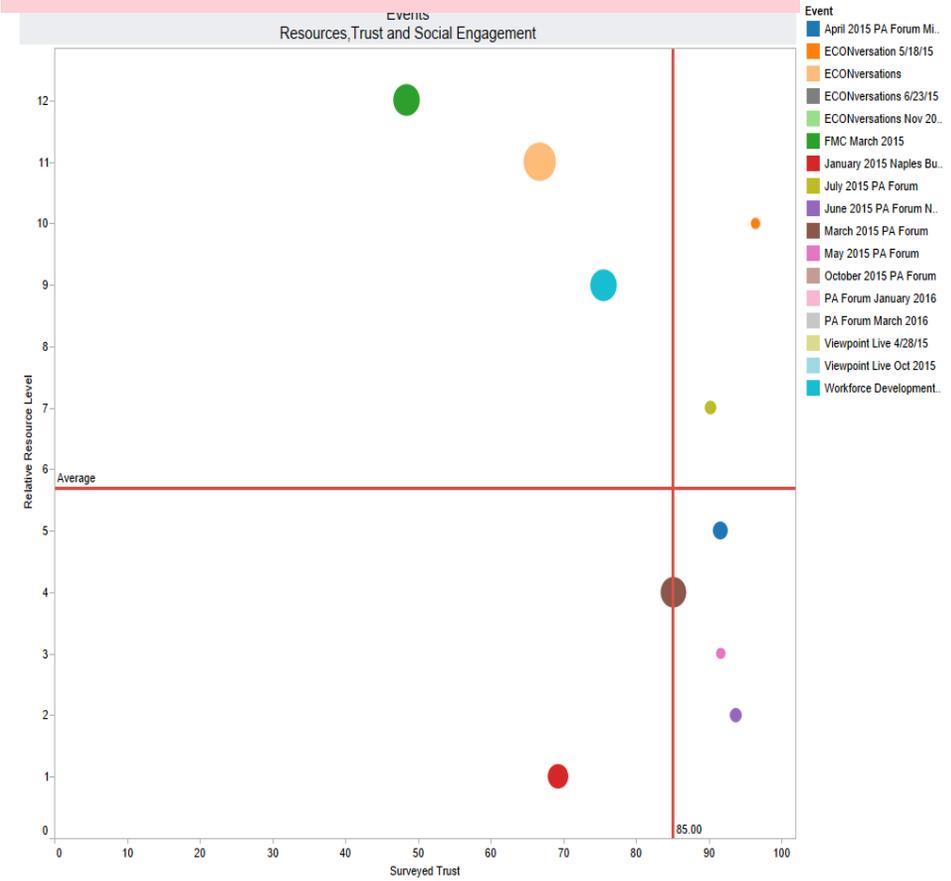
▶ Look at trends, not moments
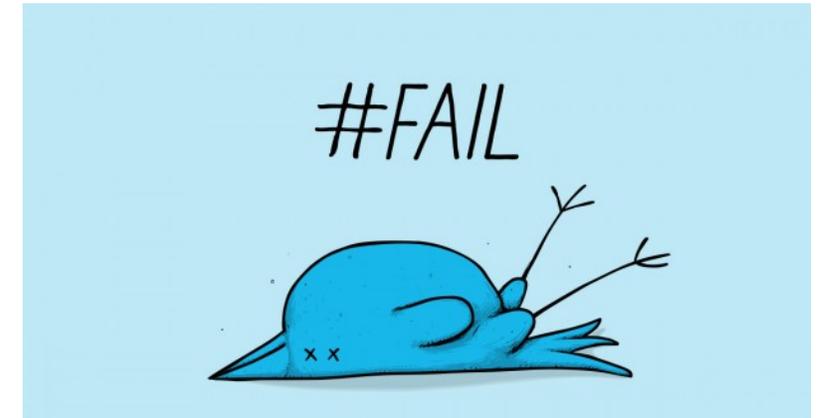
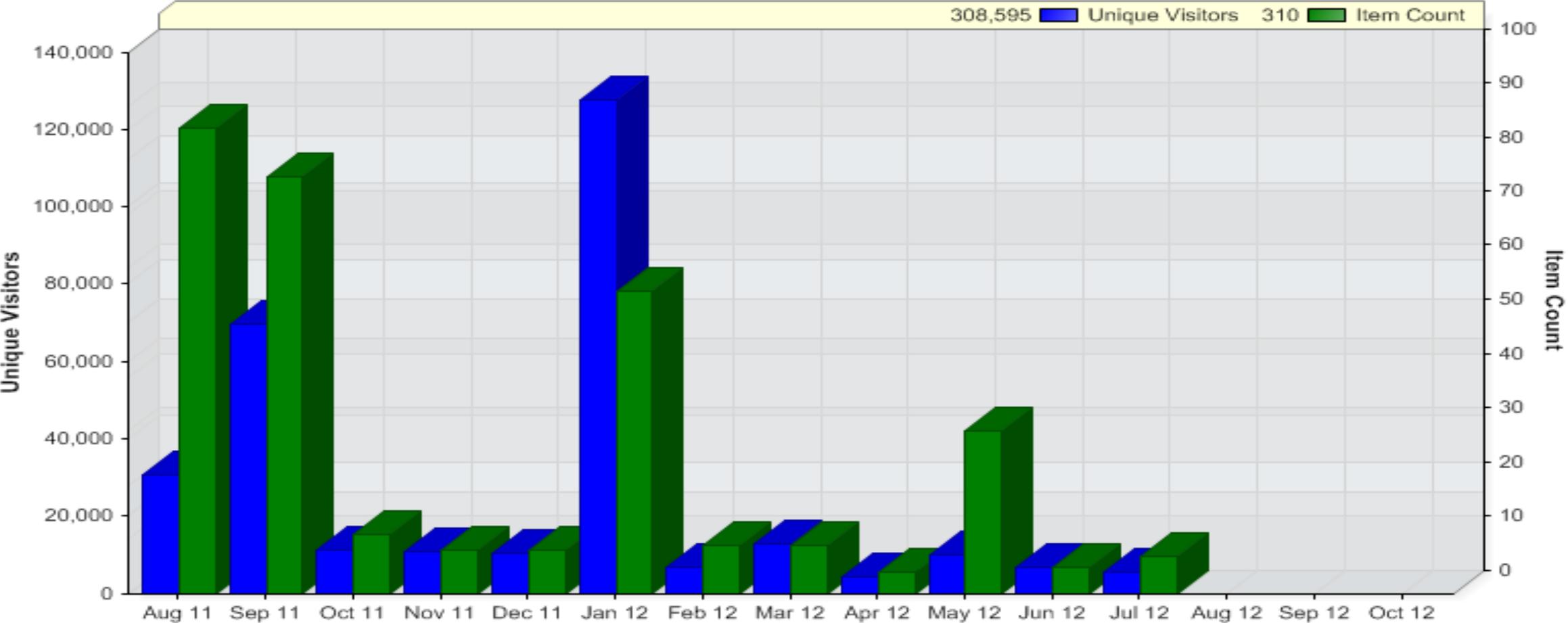# The "A-Ha!" Moments Come from Integrating Data

Correlations shown between media quality and unique traffic to the destination site
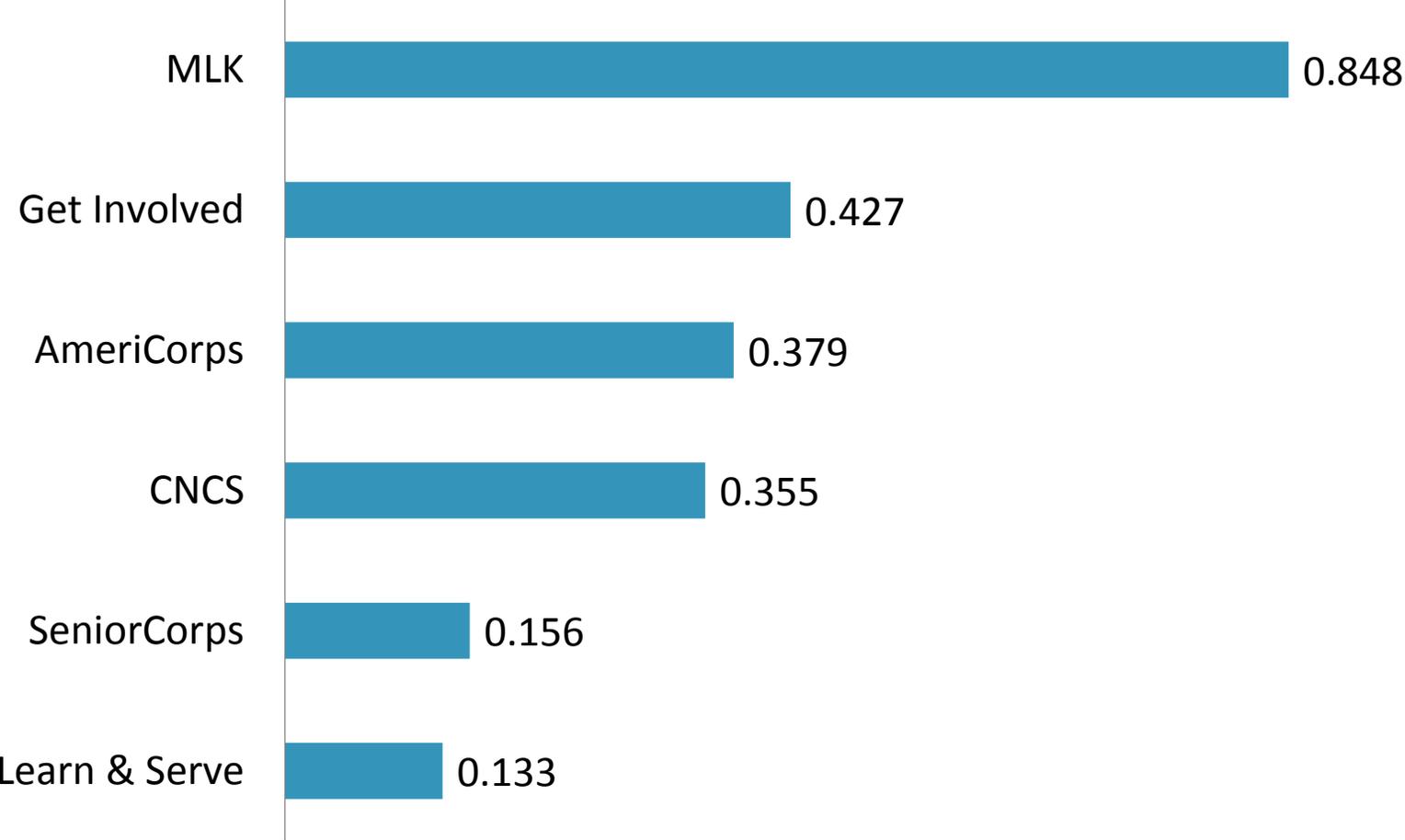
High resource events do not increase trust in the organization

White House Volunteerism Office (CNCS) is able to connect specific social outreach to registrations on serve.gov

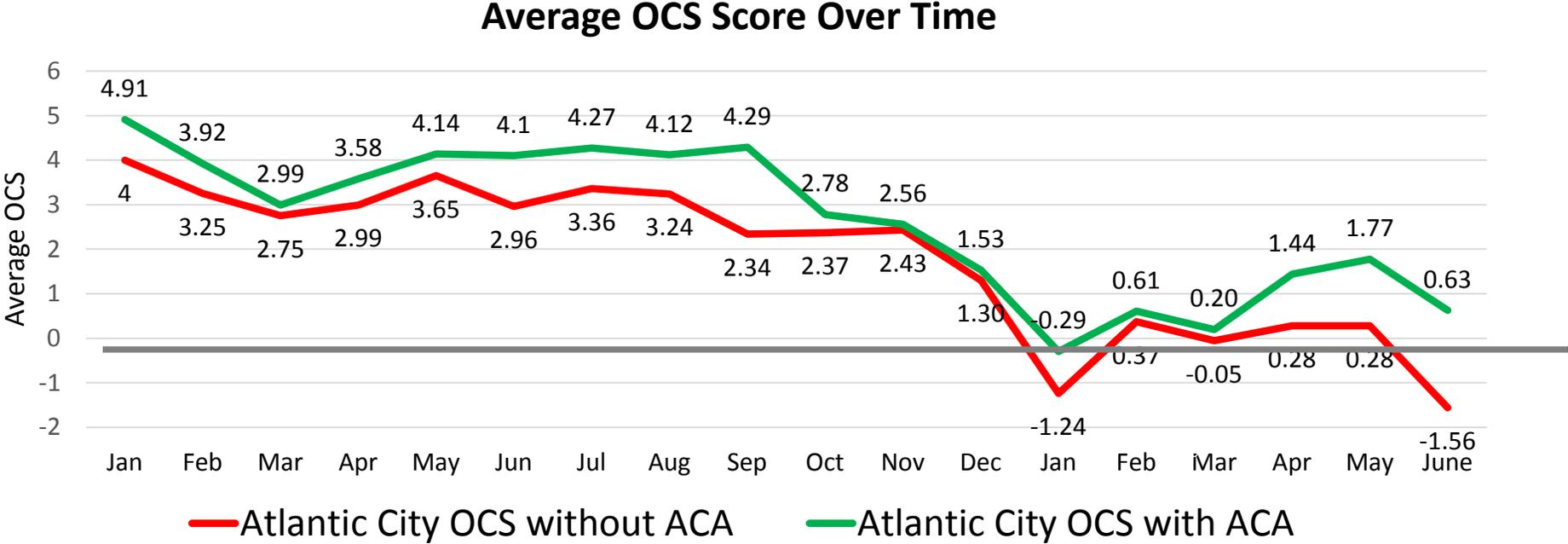# MLK saw the highest correlation of coverage to visits

Category	Correlation
MLK	0.848
Get Involved	0.427
AmeriCorps	0.379
CNCS	0.355
SeniorCorps	0.156
Learn & Serve	0.133

By showing correlation between spokespeople and desirable coverage, more subject matter experts made themselves available to PR:

▶ A Pearson correlation addressed the relationship between the number of quotes and the volume of desirable coverage

  ▷ The number of quotes and the volume of desirable coverage are positively related

▶ GT could potentially increase its share of desirable coverage by building relationships between individual subject matter experts and key reporters

Desirable Coverage vs. Spokesperson Visibility Over Time

Legend: Desirable Coverage Total; Quoteds
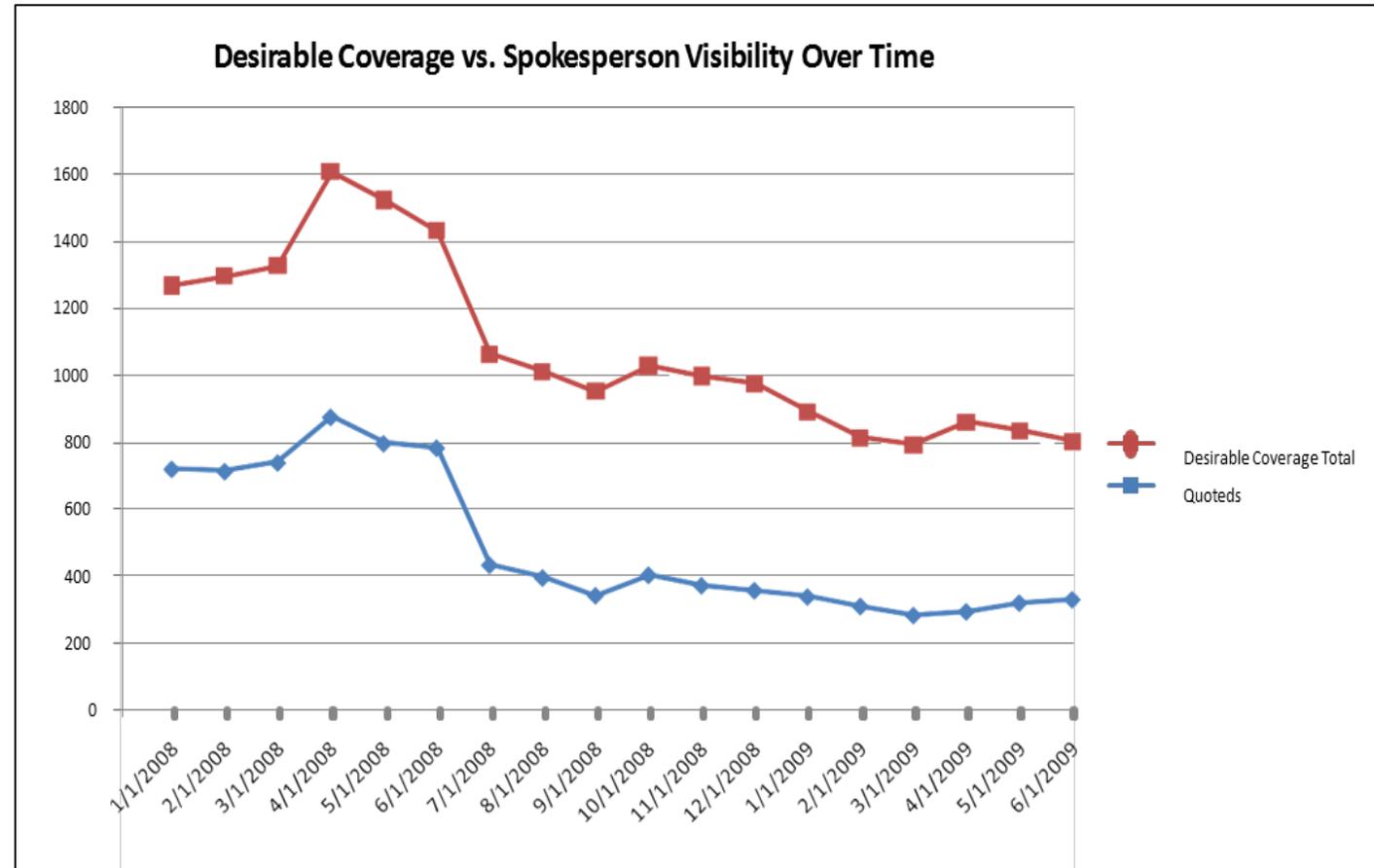
Without ACA events, Optimal Content Scores for Atlantic City would have been significantly lower

The red line represents coverage of Atlantic City minus all mentions of ACA and its programs

Average OCS Score Over Time

Atlantic City OCS without ACA (red):
4, 3.25, 2.75, 2.99, 3.65, 2.96, 3.36, 3.24, 2.34, 2.37, 2.43, 1.30, -1.24, 0.37, -0.05, 0.28, 0.28, -1.56

Atlantic City OCS with ACA (green):
4.91, 3.92, 2.99, 3.58, 4.14, 4.1, 4.27, 4.12, 4.29, 2.78, 2.56, 1.53, -0.29, 0.61, 0.20, 1.44, 1.77, 0.63

Months: Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec, Jan, Feb, Mar, Apr, May, June

— Atlantic City OCS without ACA   — Atlantic City OCS with ACA
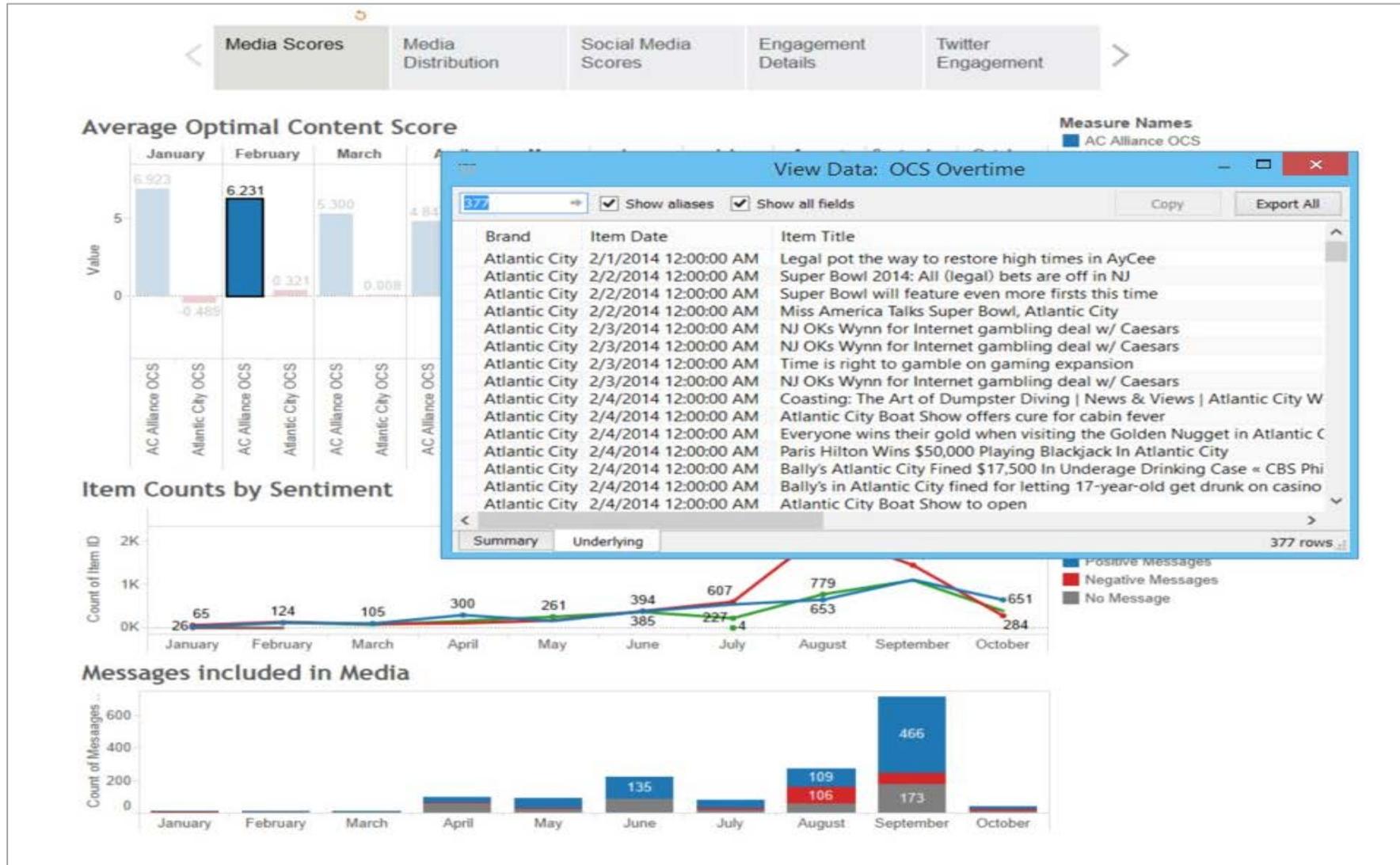
When ACA programs received media coverage, goal conversions followed

Relationship between ACA Program Mentions and Site Visits
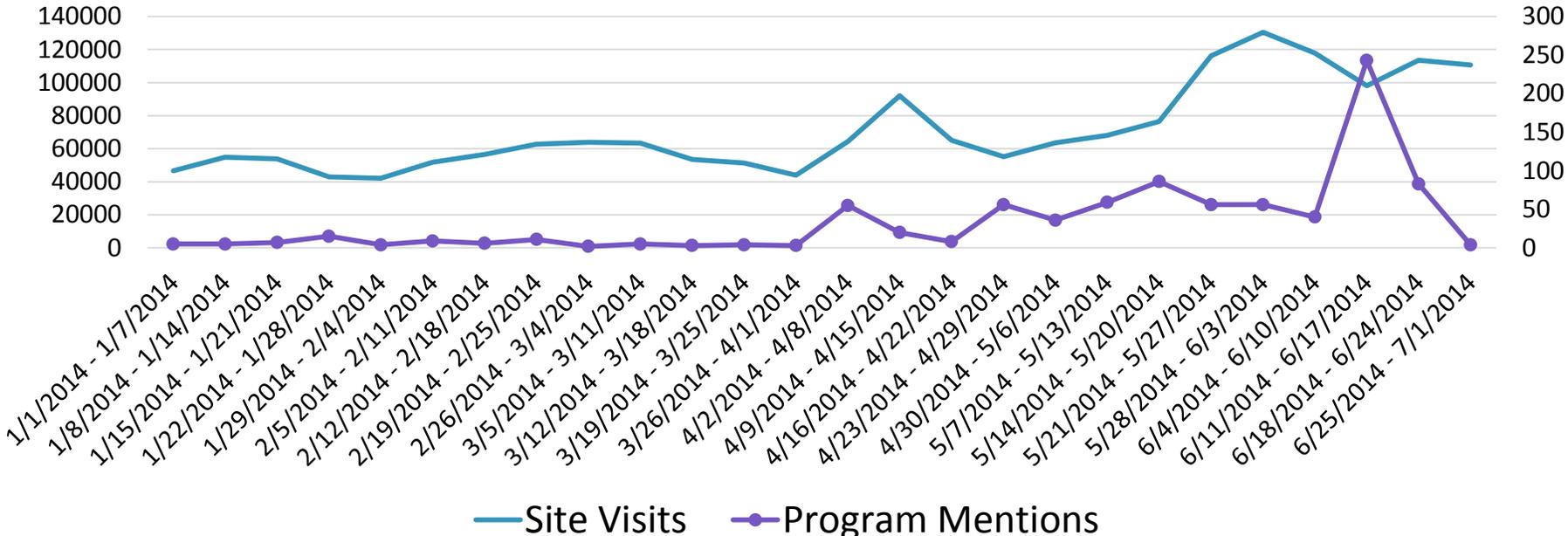
Media and Engagement Analysis

The do's

- 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

The don'ts

- 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

Thank You!

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▶ For any questions, email me: measurementqueen@gmail.com

▶ Follow me on Twitter: @queenofmetrics

▶ Or call me directly: 1-603-682-0735