PR Measurement 101: Tracking Communication Effectiveness

PRSA Buffalo Niagara Sunrise Seminar
August 13, 2013
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PR measurement has been called:

- The Achilles’ heel of PR
- The Holy Grail
- The monster that keeps the most talented PR professionals sleepless at night
Lack of measurement

- Recent PR News/CARMA survey:
  - Nearly 64% still use clip counts more than other metrics
  - 32% said primary reason for measurement is because management wants it
  - 10% admitted they don’t set objectives, don’t measure social media
Silver Anvils entries

- Lack of measurement
- Scoring in four categories:
  - Research
  - Planning
  - Execution
  - Evaluation
- Most entries fall short on Planning and Evaluation sections (my experience as judge and other judges’ comments)
- Same is true for PRSA chapter reciprocal entries
Silver Anvils entries

- Judges’ scoring (points from 0 to 10):
  0   Section omissions, no attempt made
  1-3 Would be considered unimpressive, undocumented, incomplete or have elements missing
  4-7 Indicates the entries as competent but ordinary, typical for this category, or fully acceptable
  8-10 Scores indicate you feel the entry to be exceptionally thorough, innovative, original, highly creative, and meets highest standards
Increasing Focus on Measurement

- Measurement experts (national, international)
  - Seeking to establish standards
- Business executives/C-suite
  - Eye on bottom line, want to build brand awareness
  - Bill Gates: “If I was down to my last dollar, I’d spend it on public relations”
- Academic studies of senior PR practitioners & educators
  - Need for more research skills among applicants for PR jobs
You Can Do It!

- You can beat the competition if you perform well in measurement and evaluation
- Professional workshops and webinars on measurement draw large audiences
Why So Little Measurement?

- Difficult to know what to evaluate and how to do it
- PR pros haven’t studied research techniques
- PR measures not precise (unlike finance)
- In PR, everything is in motion – can’t get accurate count (like zebra fish in aquarium)
- Some PR measures are negatives (to what extent did something bad NOT happen?)
- Research takes time, money, creative energy
- PR pros or bosses don’t believe it’s important
There’s Hope...

- Measurement doesn’t have to be expensive or time-consuming
- It’s not beyond the means of the ordinary PR practitioner
Our Goals Today

- To acquaint you with the new measurement standards
- To show you how to build measurement into your PR campaigns and programs
- To provide a brief overview of social media measurement
New Measurement Standards
The Barcelona Principles

- Seven principles that serve as foundation of PR measurement
- Adopted in 2010 in Barcelona, Spain by many PR industry groups including:
  - PRSA
  - AMEC (International Association for the Measurement and Evaluation of Communication)
The Barcelona Principles

1. Importance of goal setting and measurement
   - Goals should be as quantitative as possible
   - Should address who, what, when and how much impact is expected from a PR campaign
   - Traditional and social media should be measured
   - Changes in stakeholder awareness, comprehension, attitude and behavior should be measured
The Barcelona Principles

2. Media measurement requires quantity and quality.

- Overall clip counts and impressions are usually meaningless
- Instead, media measurement should account for impressions among audiences and quality:
  - Tone, credibility of source and media outlet, message delivery, inclusion of third party spokespersons, prominence, visual dimension
- “Quality” can be defined as negative, positive or neutral
The Barcelona Principles

3. AVEs (advertising equivalencies) are NOT the value of public relations.
   - Intent here is not to debate validity of AVEs (which simply measure cost of media space) – but to move beyond AVEs
   - Multipliers are silly, shouldn’t be applied
The Barcelona Principles

4. Social media can and should be measured.
   - Organizations need clearly defined goals & outcomes for social media
   - Evaluating quality and quantity is critical
   - Supplement media content analysis with web and search analytics, sales and CRM data, survey data
   - Technology-assisted analysis may be needed
   - Measurement should focus on conversations and communities, not “coverage”
   - Reach and influence are important, but existing sources aren’t acceptable, transparent or consistent enough to be reliable
   - Experimentation and testing are key to success
5. Measuring outcomes is preferred to measuring media results. Outcomes include:

- Shifts in awareness, comprehension, attitude and behavior related to purchases, donations, brand equity, corporate reputation, employee engagement, public policy investment decisions
The Barcelona Principles

6. Business (organizational) results can and should be measured where possible.

- Models that determine the effects of the quantity and quality of PR outputs on sales (or other business metrics) are preferred
The Barcelona Principles

7. Transparency and replicability are paramount to sound measurement.
   - Measurement should be transparent, replicable
New Guide to PR Measurement

“The PR Professionals’ Guide to Measurement” – launched in June 2013 at AMEC European Summit in Madrid

Joint effort of:

- AMEC
- International Communications Consultancy Organisation (ICCO)
- UK Public Relations Consultants Association (PRCA)

Available at:

http://prguidetomeasurement.org
Highlights of the Guide

- Measure objectively
- Focus on demonstrating links between communication activities and outcomes, not outputs
  - Outputs – what the PR practitioner does
- PR clients of major PR firms are asking about measurement and evaluation
Highlights of the Guide

- Tips for measuring global PR programs across various countries (consistency in measurement, measurable objectives)
- Shift in PR industry from counting earned media (e.g., media clips) to target audience change and business results
- Explanation of what’s wrong with AVEs (David Rockland article)
Highlights of the Guide

- A step-by-step approach to PR measurement:
  - Clarify your organizational goals
  - Determine key stakeholders and prioritize
  - Set specific objectives for prioritized stakeholder groups
  - Set key performance indicators for each objective
  - Choose tools and benchmark
  - Analyze results and compare to costs
  - Present results to CEO and senior management
  - Measure continuously and improve performance
Highlights of the Guide

- Social media can be measured
- Measurement includes insights into target stakeholders’ attitudes:
  - Social media listening
  - Go on “home visits” to see how the brand is used
  - Accompany a sales rep for a day
  - Interview customers
  - Read campaign case studies (e.g., on warc.com)
The Conclave: Complete Social Media Measurement Standards

- Approved June 2013
- Agreement on social media measurement standards for:
  - Content and sourcing
  - Reach and impressions
  - Engagement and conversation
  - Influence
  - Opinion and advocacy
  - Impact and value
The Conclave: Complete Social Media Measurement Standards

- The Conclave – a coalition of:
  - PR industry associations (e.g., PRSA, AMEC, Institute for Public Relations)
  - Major companies (e.g., Dell, General Motors, McDonald’s, Southwest Airlines)
  - PR and social media agencies

- URL for document:
Building Measurement into Your PR Campaign
The Four-Phase Planning Process

- RACE (Research, Action, Communication, Evaluation)
- Nine steps within those four phases
Phase 1: Formative Research

1. Analyzing the Situation
   - **Situation** – set of circumstances facing an organization
   - Can be positive (opportunity) or negative (obstacle)
   - Statement of situation is important at early date – to conduct efficient research and define goals
Phase 1: Formative Research

2. Analyzing the Organization

- Involves three aspects of the organization:
  - Internal environment – organization’s performance, its niche, its structure (role of PR), any internal impediments to communication
  - Public perception – organization’s visibility and reputation
  - External environment – supporters, competition, opposition, external factors (social, legal, financial factors)
Phase 1: Formative Research

3. Analyzing the Publics

- Customers – receive products/services of organization
- Producers – help organization produce its products/services
- Enablers – make the organization successful (e.g., news media, regulatory agencies)
- Limiters – undermine success of organization (e.g., opponents)
Phase 2: Strategy ("Action")

4. Goals & Objectives (more on that later)
Phase 2: Strategy ("Action")

5. Strategies – can be proactive (launching communication on organization’s own timeline) or reactive (responding to environmental influences)

Proactive strategies:
- Action (organizational performance, audience participation, special events, alliances & coalitions, sponsorships, activism)
- Communication (newsworthy information, transparency)

Reactive strategies:
- Pre-emptive action, offensive responses, defensive responses, diversion, commiseration, rectifying behavior, deliberate inaction
Phase 2: Strategy ("Action")

6. Effective communication:
   - Who to present message (spokesperson)
   - What emotional or logical appeals to be made
   - How should message be structure (one-sided or two-sided argument, start with least or most important idea, repeating main ideas)
   - What words and symbols to use
Phase 3: Tactics (“Communication”)

7. Communication Tactics:
   - Interpersonal communication
   - Organizational media
   - News media
   - Advertising & promotional items

8. Implementing the Plan:
   - Timeline
   - Budget
Phase 4: Evaluation

- 9. Evaluation (the last step)
Setting Goals & Objectives
Goals

- Statements rooted in the organization’s mission or vision statement
- General & global in nature, can’t be measured (unlike objectives)
- Categories of goals:
  - Reputation management – deal with identity and perception of organization
  - Relationship management – focus on organization’s connection to its publics
  - Task management – concerned with getting tasks done
Goals

- Not likely that one campaign will have all three types of goals
- Goals usually set by the PR manager as implementation of organization’s strategic plan
Reputation Management Goals

- Improve the company’s reputation within the industry
- Enhance the company’s prestige as the leading center for “whatever”
- Reinforce the organization’s image with potential donors (or investors)

From Ronald D. Smith, Strategic Planning for Public Relations, 3rd edition
Relationship Management Goals

- Promote greater appreciation of the company among potential clients
- Enhance relationship between company and its customers
- Maintain a favorable relationship amid organizational changes

From Ronald D. Smith, *Strategic Planning for Public Relations*, 3rd edition
Task Management Goals

- Increase public support for organizational goals
- Advance social change on a particular issue
- Create a favorable climate for the client among regulatory agencies
- Attract a sell-out crowd to a fundraising concert

From Ronald D. Smith, *Strategic Planning for Public Relations*, 3rd edition
Objectives

- Clear, measurable statements emerging from the organization’s goals
- Point the way toward particular levels of awareness, acceptance, or action
- One goal may be the basis for several objectives
- Objectives give PR professionals a reference point for evaluation later on
- Link your objectives to your evaluation
Standards for Objectives

- **Goal-rooted** – based on the organization’s goals (which grow out of mission or vision statement)
- **Public-focused** – linked to a particular key public
- **Impact-oriented** – define the effect you hope to make on your key public
- **Linked to research** – research enables you to establish numbers/percentages
- **Explicit** – clearly defined (use action verbs such as “to increase” rather than “to educate”)
Standards for Objectives

- **Measurable** – precise and quantifiable (e.g., “10% increase” rather than “an appropriate increase” or “an increase”)
- **Time-Definite** – a time frame (e.g., within six months, by July 1)
- **Singular** – focus on one desired response from one public
- **Challenging yet attainable** – stretches the organization but realistic
- **Acceptable to management** – approval from C-suite
Hierarchy of Objectives

Ordered hierarchy among objectives, based on the stages of persuasion in this order:

- **Awareness** (knowledge)
- **Acceptance** (attitude change)
- **Action** (behavior)
Awareness Objectives

- Focus on information
- Deal with dissemination and message exposure, comprehension and retention
- Appropriate for transmitting functional information, communicating on non-controversial issues, early stages of a PR campaign
Acceptance Objectives

- Deal with the affective (feeling) part of the message – people’s attitudes
- Useful in forming new attitudes, reinforcing existing attitudes, changing existing attitudes
- Useful for situations involving controversy and in persuasive situations
Action Objectives

- Target expression and conduct (behavior)
- Two types of action: opinion (verbal action) and behavior (physical action)
- May attempt to create new behaviors or change existing behaviors
- Should be focused on organization’s bottom line – e.g., donor giving, fan attendance at game, customer buying
Impact of Objectives

- As you move along the awareness-acceptance-action path, impact on your key publics will inevitably decrease.
- You might have 80% awareness on an issue, but only 40% will accept your message and only 15% will act on it.
Examples – Awareness Objectives

- To increase awareness of Erie County’s senior citizens about the advantages of Upstate Health Program to 60% within six months
- By Dec. 1, to create awareness among at least 75% of Village of Hamburg homeowners about the village’s new trash disposal policy requiring use of clear plastic trash bags; by Feb. 1, to create such awareness among 100% of homeowners
Examples – Acceptance Objectives

- To have an effect on the acceptance of Erie County senior citizens; specifically, to increase their positive attitudes towards membership in Upstate Health Program (30% within six months)
- By Jan. 15, to increase Village of Hamburg property owners’ confidence in the new trash disposal policy from a mean confidence rating of 2.7 to 3.5
Examples – Action Objectives

- To have an effect on the action of senior citizens in Erie County; specifically, to obtain an increase in their membership in Upstate Health Program (10% within six months, and an additional 10% within a year)

- To increase the percentage of Village of Hamburg homeowners who use clear plastic trash bags from the current 75% to 100% within 30 days after the program begins
Evaluation
What to Evaluate

- Program evaluation – systematic measurement of the outcomes of a PR project, program or campaign
- Based on the extent to which objectives were achieved
Research Design

- Your plan for program evaluation; outlines criteria for judging what is effective
- Considers several issues:
  - Criteria to be used to gauge success
  - Timing of evaluation
  - Specific ways to measure awareness, acceptance and action objectives
- This planning occurs before any tactics are implemented
Design Questions

- **Initial questions** – on what criteria should program be judged, what info is needed, what standards of accuracy and reliability are needed
- **Source of information needed** – who has it, how can this info be obtained from them
- **How will evaluation info be used** – who will receive final evaluation, what will they do with it, are decision-makers willing to receive evaluations less than completely positive
Evaluation Criteria

- Clearly linked with objectives
- Realistic, feasible, appropriate re cost & time
- Ethically and socially responsible
- Credible with accurate data
- Presented in timely manner
An Example: A New Website

- Your organization wants to develop a new website. Evaluation criteria should be developed before website is implemented so that you will know how to judge its success.
- What are some possible criteria for an effective website?
An Example: A New Website

- Possible criteria for effective website:
  - Ability to navigate easily through site (awareness objective)
  - Breadth of content (awareness objective)
  - Ability to convey key messages (awareness objective)
  - Number and tone of questions and comments by site visitors (acceptance objectives)
  - Interactivity (action objective)
  - Number of visitor names captured for follow-up (action objective)
- Number of hits doesn’t matter as much as comments from visitors and number of retrievable names
When To Evaluate

- **Implementation reports** – as each tactic is implemented
- **Progress reports** – mid-course evaluation
- **Final evaluation** – at end of PR campaign/program
Research Design

• **After-Only Study** – implement tactic, measure its impact and presume that tactic caused the impact
  • Common in PR evaluation – easy to conduct
  • Appropriate for action objectives that measure audience response – e.g., attendance, contributions, purchases
  • Disadvantage – doesn’t prove that the tactic caused the observed level of awareness or acceptance
Research Design

- **Before-After Study** (Pre-Test/Post-Test Study) – initial observation provides a baseline for comparing study to be conducted afterward
  - Involves three stages: 1) Observe and measure a public; 2) Expose the public to a PR tactic; 3) Measure the public again
  - Any change in public’s awareness, acceptance or action can likely be attributed to the tactic
  - But beware of other factors that might have caused the change
Research Design

- **Controlled Before-After Study** – involves two samples drawn from the same public; one receives your message, the other doesn’t (control group)
  - Involves these stages: 1) Observe and measure each group; 2) Expose one group to the tactic, but not the control group; 3) Measure each group again; 4) Compare the results
  - The control group is likely to remain unchanged
  - Any change in the exposed group likely can be attributed to your PR tactic (but beware of outside factors)
Research Design

In conducting a before-after study, beware of the Hawthorne effect

- Changes in participants’ behavior is due primarily to fact they know they are being observed
- Derived from 1939 study of workers at Western Electric Co. Hawthorne Works plant in Chicago
- When illumination increased, workers’ productivity increased – but it also increased when lighting decreased because workers knew they were being observed by researchers
Methodology: How to Evaluate
Quantitative & Qualitative Research

- **Quantitative methods**: surveys, content analyses, cost-effectiveness studies, readership studies, head counts, tracking of feedback, direct observation, monitoring of specific results
- **Qualitative methods**: interviews, focus groups, case studies
- Direct observation of outcomes can be simplest way to evaluate effectiveness of PR program
Levels of Evaluation

- Five levels, from least effective to most effective:
  - Judgmental Assessments
  - Evaluation of Communication Outputs
  - Evaluation of Awareness
  - Evaluation of Acceptance
  - Evaluation of Action
Judgmental Assessments

- Based on hunches and experience; informal feedback
- “The boss liked it”
- “We won an award”

Some judgmental assessments are helpful – by outside experts, panel of PR judges (e.g., Silver Anvil judges), senior PR practitioners’ experience

Limitations:
- Not made by impartial observers
- Can be imprecise and fickle
- Gives undue emphasis to creativity and expenditure of energy, resources
Evaluation of Communication Outputs

- A measure of the work done by the PR practitioner

- **Message Production** – e.g., count the number of news releases written, number of brochures printed

- **Message Distribution** – dissemination of messages (e.g., number of news releases emailed to reporters)

- **Message Cost** – amount of $$ spent to present message

- **Advertising Equivalency** – treating a news item like an ad – don’t do it
Evaluation of Awareness Objectives

- Focuses on the content of the message
- **Message Exposure** – e.g., number of hits on a website, number of people who saw a TV news report (media impressions – don’t indicate whether audiences understand or acted on message)
- **Message Content** – negative or positive content of a message in the media
- **Readability Measures** – comprehension of a message; various formulas (reading level, sentence length)
- **Message Recall** – day-after recall studies (participants exposed to a news story/TV program, then interviewed to determine what they remember)
Evaluation of Acceptance Objectives

- Focus on levels of acceptance/attitude change
- **Audience Feedback** – e.g., number of hits on web page, number of phone calls, number of requests for more information
- **Benchmark (Baseline) Studies** – comparing program outcomes against a standard:
  - Starting level of interest in your program
  - Outcomes of similar programs by other organizations
  - Outcomes of your program from a previous year
  - Outcomes of industry/professional models, hypothetical outcomes of “ideal” program
Evaluation of Action Objectives

- Focus on action sought from your key public – the ultimate objective ("bottom line")

- **Audience Participation** – e.g., attendance figures (but don’t presume attendance at event equates with action!)

- **Direct Observation** – look around and count – e.g., number of donations, sales figures, votes for a political candidate
Data Analysis

- Match observed and reported results against your original objectives
- If program failed to meet objectives, do more analysis:
  - Flawed strategy?
  - Tactics not implemented as expected?
  - Flaw in your evaluation techniques?
Evaluation Reports

- Present evaluation in form accessible to decision-makers
- Be clear, concise, draw conclusions, highlight most important data
- Management will be more interested if:
  - They were involved in setting objectives
  - You concentrate on elements that can be changed in future
Evaluation Reports

• Variety in format: formal document, oral presentation, meeting agenda item
  • If report longer than 5 pages, include executive summary
• Report should link original objectives to your outcomes
• Indicate:
  • How outcomes were measured
  • Degree to which they achieved objectives
  • Significance of achievement
  • Make clear recommendations linked with data
  • Use visual elements – charts, photos, tables
Social Media Measurement
Angela Jeffrey’s Approach

- “Social Media Measurement: A Step-by-Step Approach” (June 2013)
- Eight-step measurement process applied to social media

From: Angela Jeffrey, *Social Media Measurement: A Step-by-Step Approach Using the AMEC Valid Metrics Framework*
1. Identify Organizational & Departmental Goals

- **Social media goals** could include:
  - Increasing positive brand awareness and reputation
    - E.g., Dell’s turnaround from “Dell Hell”
  - Establishing thought leadership
    - E.g., Sun Microsystem’s revitalization of its brand through dedicated blogging
  - Increasing sales
    - E.g., Stormhoek Wines reaping a 400% sales increase after sending products to bloggers
  - Reducing R&D spend
    - 98% of online respondents who said they’d definitely buy a product they had helped evolve through a process like Dell’s Idea Storm
2. Research Stakeholders & Prioritize

- **Internal research** – talk to marketing, sales, HR, customer service to determine where social media can best contribute
2. Research Stakeholders & Prioritize

- **External research:**
  - **Create a social graph** – review stakeholder groups and obtain names/email lists of their most important members
    - Examples of groups: media, bloggers, customers, employees, vendors, analysts, investors
  - **Discover where each person is engaged in social sphere** (e.g., email marketing service MailChimp has plugins such as Rapleaf and SocialPro)
  - **Surveying** – offline listening to key stakeholders; many research companies available
  - **Online listening** – keyword and message analysis (recurring themes, complaints, topics and messages)
3. Set Objectives for Each Group

- Meet with management – determine which goals and stakeholders are most important
- Then create measurable objectives for each stakeholder group ("key public")
4. Set Social Media KPIs for Each Objective

- **KPIs** – Key Performance Indicators
- To set KPI numeric goals, look at historical data
- If none exists, take a best guess and adjust after PR campaign gets underway
4. Set Social Media KPIs for Each Objective

- Example #1 – If objective is to increase inquiries, web traffic or recruitment, select a percentage increase in web traffic and/or number of click-throughs or downloads as KPIs.
- Example #2 – If objective focuses on sales, KPIs could include: click-throughs to a specific URL, increase in conversations, online donations, membership sign-ups.
- Example #3: If objective focuses on brand engagement, KPIs could include: ratio of posts to comments, increase in unique visitors, number of returning visitors, number of pages downloaded, sessions lasting longer than 5 minutes, number arriving from a Google search, percent recommending the brand.
5. Choose Tools and Benchmark

- **Public Relations Activity** – metrics reflecting efforts in producing and disseminating messages
- **Intermediary Effects** – metrics reflecting third-party dissemination of messages to target audiences
- **Target Audience Effects** – metrics showing the target audience has received the messages and any resulting action-driven outcomes
- Important to get the audience to move from **awareness** to **knowledge** to **interest** to **support** to **action**
6. Analyze Results and Compare to Costs

- Look at spreadsheets for insights – e.g., Where could more target audience members have been grabbed?
- Cost effectiveness (ideas from Katie Paine)
  - Factor in the cost-per-click or cost-per-lead to help judge efficiency of different programs
  - Pull sales data from web analytics and compare against costs
  - Look at cost savings in areas like customer service and recruitment
  - Look at paid vs. earned search rankings; if earned search is doing well, it may be possible to decrease paid searches
7. Present to Management

- Find out how management likes to receive data
- Use same format for reporting data as other departments in the company
- Show how key messages may have impact business goals
- Create a dashboard or scorecard with headlines, bullets, and metrics that show trending
8. Measure Continuously & Improve Performance

- Unless it’s a one-time program, measurement must be ongoing
- This allows you to set better benchmarks and refine your programs
- Set a regular schedule for analysis and presentations to management
The PR Professionals’ Guide to Measurement

- Social media can be measured!
  - Richard Bagnall, Chair, AMEC Social Media Measurement Committee
- To measure exposure with your core audience, consider:
  - Organization/brand mentions
  - Share of conversation
  - Search rank
  - Click-throughs
  - Web analytics
The PR Professionals’ Guide to Measurement

To measure engagement with your core audience, consider:

- Comments/posts ratio
- Number of links
- ‘@’ mentions/retweets/retweets as a percentage of total
- Number of bookmarks/likes/votes/’pins’
- Shares and likes
- Number of subscribers
- URL visits
- Awareness
The PR Professionals’ Guide to Measurement

- To measure the action taken as a result of the social media campaign, consider “outtake/outcome” metrics:
  - Footfall (number of people who go into a store in a particular period of time)
  - Purchases/donations
  - Website visits and downloads
  - Coupon redemption, endorsement
  - Awareness

- These metrics are available from: content analysis of online conversations, market research, web analytics, info from your sales/marketing team
For More Information

- Handout – “Recommended Readings, Books and Websites on Measurement”
- 2013 PRSA International Conference in Philadelphia – measurement symposium co-hosted by PRSA and AMEC
- PRSA free webinars on measurement
Questions?

- Contact me at: silverda@buffalostate.edu

- Thank you!