N.B. This project was first delivered in 2012 by the then Dementias and Neurodegenerative Diseases Research Network (DeNDRoN).

Research, Planning & Measurement Toolkit

March 2011 Edition

CIPR

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ABOUT THIS TOOLKIT

Welcome to the 2010 edition of the CIPR's Research, Planning and Measurement Toolkit, a practical guide to research, planning and measurement – what it is and how to do it. It is supplemented by case study examples, introductions on how to measure non-media campaigns, an overview of social media measurement, including a glossary of social media terms, and links to useful measurement resources. For the first time, the guidance also includes tips on how to link PR measurement to what else is happening within organisations – across functions and at the board table.

As with previous editions of the CIPR Toolkit, there are extensive tools and guidance on research and planning – the bedrocks of measurement. Without clear, research and planning, the value of PR cannot be measured. Creativity and implementation are not covered because the focus is on the process and techniques of research, planning and measurement. It is therefore not a definitive guide to producing a PR campaign or more broadly based PR programme but an explanation of the framework on which to base them.

We will be enhancing this Toolkit and the supporting guidance with the addition of the following:

- The introduction of AMEC's PR Measurement metrics – alternatives to AVEs, to be launched in November 2010 following consultation with the CIPR and other bodies

- The launch of detailed social media measurement guidance in January 2011 from the CIPR's newly formed social media measurement group. This area is developing fast, so guidance will be continually updated.

The CIPR would like to thank all those that provided advice and contributions to this edition of the toolkit which is based on previous toolkits researched and complied by Michael Fairchild.

FOREWORD

This new edition of the CIPR, Research, Planning and Measurement Toolkit is designed to help practitioners design impactful campaigns and successfully communicate the value we add to organisations, communities and society. It will be updated regularly and we are calling on our Members to contribute to this toolkit by sharing best practice examples of research, planning and measurement.

Measuring the positive impact of our work as practitioners is a vital part of building the credibility of the PR profession. Public relations, is an investment in the collective reputation management of organisations' largest intangible asset. For boards of directors, ministers, trustees, owner managers or volunteers entrusting their organisation's reputation to public relations practitioners, our contribution matters. But we must plan carefully and measure impacts if our contributions are to be recognised.

PR can be measured, but there are no magic bullets. The Barcelona Principles, the first global standard for PR measurement, were launched by AMEC in July 2010 and clearly underline the importance of measuring outcomes linked to organisational objectives. For those Members who are familiar with earlier editions of the CIPR's Research, Planning and Measurement Toolkits, the focus on outcomes is consistent with our guidance and Members will recognise the core principles from previous editions. However, for the first time, the global PR profession is united behind a set of principles that clearly state AVE is not a measure of PR value, recognising the complex and changing nature of relationships between an organisation and its publics.

What follows in this Toolkit are best practice tools to help our members to research, plan and measure. I would like to thank all those members, partners and organisations who gave their input and guidance to this updated edition and those who developed the previous Toolkit editions. We look forward to your contributions and feedback.

Jay O'Connor, FCIPR, CIPR Chartered Practitioner, CIPR President 2010

We call it the Barcelona Principles. It's the first ever framework for global measurement standards for public relations and it is at the forefront of a new global milestone in

measurement. We strongly welcome the CIPR's endorsement of the Barcelona Principles and its involvement in the Barcelona Principles debate at our 2nd European Summit.

AMEC actively supports what the CIPR is doing to help its members better understand the importance – and the changes – which have taken place in PR programme measurement and measurement. We have worked with the CIPR on different parts of this new member measurement initiative, sharing the same commitment for higher professional standards. We are keen to work with you further in the future.

The seven Barcelona Principles are not the complete solution, but they are a step forward towards ending years of debate as to whether there should be global standards, and whether unacceptable metrics such as AVEs and multipliers should be used. They are:

1. Measurement and goal setting are fundamental to any PR programme
2. Media measurement requires quantity and quality measures; quantity measures on their own are useless
3. AVEs are not the value of PR
4. Social media can and should be measured
5. Measuring outcomes is preferable to measuring to outputs
6. Business results can and should be measured wherever possible
7. Transparency and replicability are paramount to sound measurement

All CIPR members, like Lord Bell, chairman of Chime Communications should believe that PR programme measurement is important. Interviewed by Gorkana. Lord Bell said measurement was the area the PR industry is least good – or least wanted to be - good at. He said: *"I happen to think it's very important for us to evaluate our work because otherwise why should anyone have any confidence in the relationship."*

It is as simple and as important as that. Programme measurement proves to clients that what you are doing, whether in house, or servicing your own clients, is working. Measurement also gives you insights to allow you to make changes along the way. The Barcelona Principles was a first step in a journey. With the help of the CIPR – and the active involvement of its members – we can make programme measurement just as important as that big creative idea.

Barry Leggetter, FCIPR, Executive Director of the International Association for Measurement and Evaluation of Communication (AMEC)

The improved ability to measure the results of its efforts, and evaluate the outcomes, is the single biggest challenge to the future of the UK comms industry. It is an issue that has been around for decades, but the recession and huge underlying structural changes in the media, make measurement more critical than ever. Professional communicators will be called to justify their return on investment as never before. Meanwhile the necessity to communicate via social media is a major opportunity for PR and comms professionals, but only as long as their talents and efforts can be fully justified to their ultimate paymasters.

Danny Rogers, Editor, PR Week

SECTION 1: WHY MEASURE?

Research, planning and measurement is, quite simply, the best way to demonstrate public relations' effectiveness in helping an organisation achieve its goals.

If 'measurement' is employed merely to justify the PR budget, it is done for the wrong reason. PR measurement carried out in isolation and unrelated to the wider organisational context has little value. A high score – or a low score for that matter – in, say, a league table based on favourable or unfavourable media coverage, is not only meaningless but possibly dangerously misleading if the coverage is not relevant to the goals of the organisation.

It is vital that organisations understand that measurement can do much more – as a diagnostic tool in pre-campaign planning and post-campaign analysis, for example, and as a means of providing competitive insights and other commercially useful information that may have value beyond the PR brief.

Research, Planning and Measurement is Important:

- To demonstrate the value of PR and the attainment of both PR and business objectives – not only in terms of outputs but what the campaign has led to (the outcomes – for example behavioural change)
- To facilitate more effective audience engagement and to feed into PR planning
- To help build the credibility and influence of PR within organisations, and demonstrate the contribution of to strategic business decision-making and organisational success
- To analyse key message pick-up, adaption and reproduction among publics and those who influence publics
- To gather intelligence about a sector, trends and issues (historic and future), and how an organisation and its peers and competitors are regarded
- To provide a benchmark against which to measure the effectiveness of a PR programme
- To provide a 'hard' measure of success to reinforce the case for PR.

SECTION 2: THE RESEARCH, PLANNING AND MEASUREMENT PROCESS

This five-step guide helps practitioners to navigate through the research, planning and measurement process. The principles apply to all forms of public relations activity from media relations where, for example, a simple measurement is required of the coverage achieved and if this has led to certain outcomes (behaviour change for example), to more broad based programmes using a mix of non-media PR strategies and tactics.

Step: 1 Audit - Where Are We Now?

The correct use of information will ensure measurable objectives and a sound strategy, leading to effective and 'on target' PR campaigns. This guide offers a number of practical tools to get that process under way.

An effective PR programme capable of being researched, planned and measured starts here – the PR brief.

The following checklist is a foundation for any type of PR activity. Working through this brief – with the organisation or client – is the first step to creating a PR programme that is factually sound, with realistic and measurable objectives.

The PR Brief

The PR brief should include information on the following areas. If this information is not readily available, the public relations practitioner has an opportunity to work with the organisation to improve the quality of information available for research and planning purposes.

The sector / market

- Profile of market or sector: size, dynamics, trends
- Organisation's status and reputation
- Competitors' status and reputation; role models

- Profile of customers / stakeholders in market or sector
- Characteristics – seasonal / regional / other
- Issues that could affect PR

The client / organisation

- Vision, mission and values
- Description of the organisation – what does it actually do?
- Background and history
- Overall strategic goals
- Organisational objectives
- Marketing / sales / objectives
- Product / service-specific objectives
- Stakeholder / customer profiles by product / service
- Unique selling points
- Production / service processes – how does it function?
- Organisational / management structure
- Where does the organisation want to be in 3 / 5 years (the vision); what will help or impede that?

PR requirements

Key questions based on the research, planning and measurement process:

- What are the measurable PR objectives and how do these relate to the organisation's objectives?
- Where are you starting from?
- Which audiences do you need to reach?
- What are the messages by audience?
- How do you want each audience to respond?
- How will you listen to audience input and feedback? Will this be fed back into the organisation? If so, how?
- What do you need to measure to determine success?

PR background

- PR history – what worked and what did not?
- Review previous PR briefs and results, including previous measurement
- How, if at all, were the results of PR disseminated within the organisation and with what effect?
- Who in the organisation is responsible for PR or influences it?
- What influence does PR have in the organisation? What level of understanding is there?
- Skills and competencies: media training, crisis management
- Desired relationship with the organisation, including the board, functions etc

Research & support materials

- Literature: organisation, client and competitors
- Market research (internal and external sources)
- Media and online measurement reports

Integrated communication

- Brief on advertising, promotions, direct marketing and other communications that could impact PR or should be integrated with the campaign
- Objectives and timings for these activities

Process

- Desired response to organisation / client brief
- Budget
- Available resources
- Campaign timeframe
- Presentations to internal teams
- Other factors to consider?

Research & Planning Tools

SWOT Analysis

This is one of the most valuable analysis tools. It helps you to tease out what matters. It can be used for a range of tasks from fact-finding to building a client / organisation reputation profile.

This example is from a hypothetical national charity:

Strengths	**Weaknesses**
Commitment of staff & volunteers Track record of success in specialist area 'Fame' of chief executive 'Newsworthy' reputation with media Financial reserves	Too closely linked with Africa Name no longer an apt descriptor Ageing supporter/donor profile Poor understanding of 'PR' internally Reluctance to think outside the box
Opportunities	**Threats**
Use planned re-branding as key editorial platform Differentiate communication between givers' and 'doers' Target younger potential supporters Use internal comms to engage and empower staff in 'marketing'	Risk of 'over-promising' in comms Insufficient internal resources to sustain higher profile demands Disaffection of 'abandoned' traditional supporters Insufficient evident change to sustain 'younger profile'

PESTLE Analysis

The PESTLE analysis is a tool to help identify your organisation's market position and strength and to understand the issues that will impact the PR campaign. Conducting such an analysis presents an opportunity for the PR practitioner to engage with the board and other functions within the organisation that will have a view on, and access to information relating to the key PESTLE areas of analysis.

Political What is happening politically in the environment in which you operate, including areas such as tax policy, employment laws, environmental regulations, trade restrictions and reform, tariffs and political stability?	**Economic** What is happening within the economy, for example; economic growth/ decline, interest rates, exchange rates and inflation rate, wage rates, minimum wage, working hours, unemployment (local and national), credit availability, cost of living?
Sociological What is happening socially in the markets in which you operate or expect to operate, cultural norms and expectations, health consciousness, population growth rate, age distribution, career attitudes, emphasis on safety, global warming?	**Technological** What is happening technology-wise that can impact what you do? How will it impact your products or services? Things that were not possible five years ago are now mainstream for example mobile technology and social networking. New technologies are continually being developed and the rate of change itself is increasing. There are also changes to barriers to entry in given markets, and changes to financial decisions like outsourcing and in sourcing
Legal What is happening with changes to legislation? This may impact employment, access to materials, quotas, resources, imports/ exports, taxation etc	**Environmental** What is happening with respect to ecological and environmental aspects? Many of these factors will be economic or social in nature

Source: CIPD 2008 PESTLE analysis

A Guide to PR Planning Terminology

Objective

What the PR campaign is designed to achieve to meet client goals, as it is aligned to organisational goals e.g. to reduce the number of lives lost due to smoke alarm malfunctions.

Plan

The framework for implementing the strategy e.g. to reach vulnerable members of society with the message that a smoke alarm without a battery puts lives at risks; Decisions about target audiences, messages etc.

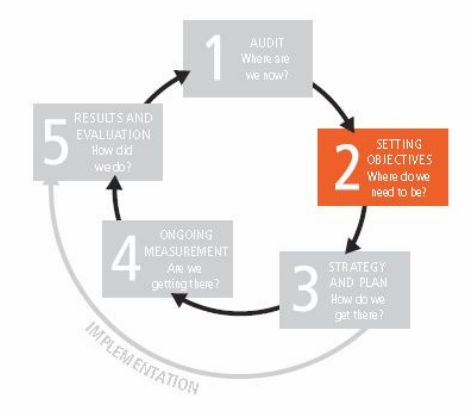
Strategy

The broad principles of how the PR activity will be conducted e.g. a media relations strategy; or to use target audience focus groups to source editorial angles.

Tactics

The detail of implementation e.g. the media schedule, story angles, approaches to government preparation of reserve statement or Q&A's, internal brief.

Step 2: Setting Measurable Objectives: Where Do We Need To Be?



The principle behind setting an objective for a PR campaign is that: it must reflect the objectives of the organisation – an overall 'corporate' objective, one related to product or service delivery, the customer, stakeholder or employee.

Audiences

Consider all potential audiences, then prioritise – could 20 per cent of the audience deliver 80 per cent of the benefit? Other questions:

- If a particular audience is difficult or expensive to reach, is there an 'intermediary' who can do the job for you – an organisation to which an audience belongs or has access, the media, online communities and other networks, both offline and online?
- Are there secondary audiences you can reach via other types of communication?
- PR may reach an audience, but how the audience engage and respond? This requires other measurement, for example talking to a sample of that audience or observing them, building a dialogue, collecting feedback from publics etc and feeding into organisation plans.

Messages

- Devise by audience
- What response is desirable?
- Are they, realistic and sustainable?
- How are messages received, reproduced and fedback? What organisational response mechanisms are in place?

Medium

With the right audience and message, the medium may select itself, but the key is to understand how best to reach and engage with the publics that matter to your organisation.

Timing

Consider:

- The impact of media with different lead times
- The difference between changing attitudes / behaviour and merely 'seeing' an item or attending an event - particularly important for measuring 'outcomes'
- The impacts of real time online vs other engagement mechanisms.

How to match PR to client / organisational objectives

The 'looser' the brief the more risk that objectives-driven strategic thinking will be diverted down a creative blind-alley. By developing, with your organisation and client, PR objectives based on business goals, creative ideas will tend to 'present themselves' and, more to the point, will deliver against an organisation's need. For example:

A car manufacturer wants to increase market share

▼

Organisational goal: To double market share by 2012

▼

Business objective & strategy: Expansion of sales in the UK by creating sufficient awareness on the back of the proposed government scrappage scheme

▼

Marketing / sales objective: Increase brand awareness by focusing on those considering buying a new car using the scrappage scheme, to automatically think of the manufacturer

▼

Communications objective: For the manufacturer to be associated with the scrappage scheme, thereby driving queries and visitors.

How To Set Measurable Objectives

A highly targeted PR campaign may have a single objective for a specific audience but generally the message will vary from one audience to another. In this example, a boat manufacturer specialising in larger cruising yachts is launching its first relatively inexpensive 'trailer-sailor', a small family yacht with four berths and an outboard engine. Amidst mounting interest in sailing, there are growing calls for better safety at sea and legislation to regulate 'week-end sailors'. The boat comes with a 'welcome aboard' free basic tuition and safety course.

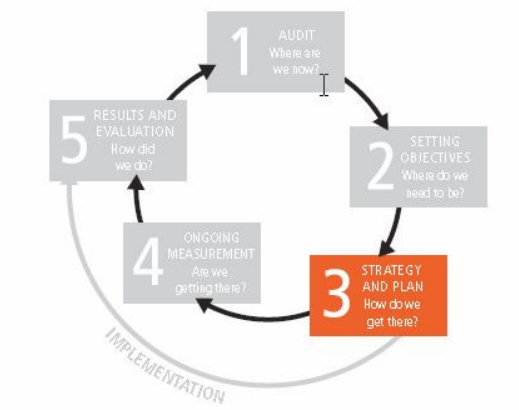
Audience	Measurable PR objectives	Strategy	Measurement	Timing
Consumers (sailors / boat owners)	Create awareness of the price and the emphasis on safety, to lead to increased sales	Differentiate media angles from non-boat owners	Compare messages, monitor brokerage visits, web chat & helpline, track message penetration & source	Mid and post-campaign to measure awareness shift
Consumers (non-owners)	Create awareness of 'welcome aboard' package	Target leisure and family media/bloggers via individually sold-in stories	Six broadly favourable articles with 'safety' messages	Within one month of campaign end
Brokerages	Understanding of technical spec and key target of non-sailors	Support training programme with media / online response	Agreed number of test sails	During first six months
Marine industry bodies, (harbour / river authorities, RNLI etc)	Associate the maker with producing a new generation of 'safe' family boats. To improve reputation and sales	Individual mailing to key influencers; invitations to attend customer test sails; 'merchandising' of media/online coverage	Informal/anecdotal based on replies to letters/invites and personal contact	Pre-launch and at agreed periods during and post-launch
Regulatory bodies (Dept. for Transport, local authorities, etc)	Demonstrate that maker is 'ahead of the game' in terms of impending regulation	As above	As above with specific reference to scope for influencing possible legislation	As above
Factory employees	Persuade staff that new model will reinforce reputation, widen customer base and secure jobs	Workshops pre-launch; involvement with brokerages and motivate with media coverage summaries	Informal focus group in manufacturing sites and pre / post launch questionnaire to monitor awareness and attitude	Pre and post-launch

How To Design Messages by Audience

Designing messaging by audience is an integral part of PR planning and will be a key output measure. For example, a college of fashion and design has joined forces with a university for mutual benefit: to enliven the image of the university whose research showed that its traditions were deterring applicants; and to bring gravitas to a college regarded as 'frivolous' in a poll among further education applicants.

Audience	Messages	Desired response	Medium
Potential applicants of university	A livelier, more relevant place to study, not devalued by the college link	I'm not deterred, may place higher on preference list	Online, social networking sites 'varsity website, 'fringe' media, lifestyle pages, education press
Potential applicants of design college	You can still express yourself and be taken more seriously	I want to know more about how I'll 'fit'	Design media, lifestyle pages, college media, familiarisation meetings, online communities etc
University staff	Not a threat, an evolutionary 'move with the times'	I'm open minded and want to know more about what we have in common	Internal communication, live 'exchange' events, reassurance from media
College staff	Recognition of design's place in society	This is 'recognition' but how 'cramped' will we feel?	Intranet, Live 'exchange' events, reassurance from media
University patrons (design college is state funded)	Broader appeal gives greater security of status	Continued patronage will depend on evidence of successful union	Reliance on one-on-one updates, education media, and university website
Government department	Potential example of a future Egalitarian education system	Positive reaction of education establishment and public (parents, students) is crucial	Educational media briefings, including media coverage digest, educational websites
Media / bloggers (education)	A serious experiment in uniting education cultures	How is it working 'from the inside'?	Exclusives to key media / bloggers
Media / bloggers (lifestyle / design / fashion)	Recognition of design's 'serious' contribution	How is it working from the point of view of individual design students?	Exclusives to key media / bloggers
Media / bloggers (national)	A news and picture-worthy story with varied angles. Online content and video	We're open to suggestions	A mix of straight news, and features to reflect both the 'design' and 'university' aspects
Media / bloggers (local)	Your town's contribution to an educational experiment is important	We're open to suggestions with strong local angle	Highly customised approach

Step 3: Strategy & Plan: How Do We Get There?



As the campaign progresses how will we know if it's working or requires a mid course correction? At the end, how will we know the extent to which it has achieved the objectives?

A PR campaign needs a strategy ('the how?') and a plan of execution. A key part of the strategy and plan is to determine how PR will be measured.

Not everything is easily measurable and the complexity and cost of measuring may be significant. On the other hand, measurement of effectiveness may be crucial – for example, to build the case for relying heavily on a particular technique or reaching a specific audience – so that measurement might justify the lion's share of the budget.

The following shows how input, output, out-takes and outcomes help to create a robust research, planning and measurement structure.

Input

Background information and research including, for example, an analysis of current organisational perceptions, to inform the initial planning in Step 1. Some of this information could provide benchmarks against which to measure later. For example:

- The PR brief (information on organisation / sector)
- Desk research and original research (to inform content of PR materials)
- Pre-testing (messages / materials understood)

Output

Literally, what messages go out from the organisation? This is a measure of a quantified nature that can analyse the degree of exposure and audience reach, but cannot explain to what extent people's opinions or behaviour have been influenced. Many PR campaign measures are built around outputs, but this does not allow PR practitioners to demonstrate the positive impact their work has had on an organisation and its objectives. For example:

- News issued and coverage monitored (media measurement)

- Website launched (traffic analysis)
- Event staged (who and how many attended?)
- Research survey conducted (to inform strategy and plan)

Out-take

The extent to which the audience is aware of the message, has understood and remembered it and their response – some of which can be tracked online in real time via tweets, blog comments or online community threads. Information from a sample of the target audience during the course of a campaign can provide confirmation that the campaign is working, or an early warning that the tactics or strategy may need adjustment. For example:

- Analysis of coverage (media measurement)
- Online tracking of comments and feedback and engagement with audiences
- Is audience 'getting message' and likely intentions? (Qualitative / quantitative research)

Outcome

Measuring outcomes should be the focus of PR measurement, so that the positive impact on the organisational objectives can be clearly articulated. Measuring outcomes is about understanding the degree to which PR has changed people's awareness, opinion and behaviour. This is the most valuable form of measurement: concrete proof such as a rise in sales that can be traced to PR, focus groups to confirm a shift in behaviour, or simple observation. Outcome is the strongest basis for estimating a return on the PR investment, and the source of valuable information to be fed back into the research, planning and measurement process and the client's or organisation's strategic planning. For example:

- Results versus objectives
- Hard' evidence (quantitative research, sales, numbers, a vote passed)
- 'Soft' evidence (qualitative research, observation, anecdotal)
- What did each PR / research method contribute?
- What was the return on PR investment?
- What lessons for next time?

Source: Based on 'Top 10' Research methods for planning & evaluation in 'How to Measure PR & Corporate Communications' published by MASS Communication Group. Jim R. Macnamara

Measurement Tools

A wide range of tools are available to evaluate PR effectiveness. The choice depends on the degree of sophistication required, resources and budget. Externally sourced research will, as

a general rule, be more thorough and reliable but, as demonstrated in Step 1, a lot of information is free and easily accessed.

A 'menu' of research methods is listed here arranged by level according to the degree of sophistication and whether it can be sourced and reliably analysed by the PR team.

The distinction between levels is indicative rather than mandatory. It is possible to 'pick and mix' between levels, or at least to explore what other options are available to aid planning. This process becomes less practical as you move further into the research, planning and measurement process.

For example, it is not possible to achieve a definitive outcome such as a shift in opinion or behaviour without investing in the appropriate level of planning and research in the earlier steps.

A Research 'Menu'

	Basic **PR team can source and analyse internally**	**Intermediate** **Managed by PR team with some external help from a research provider**	**Advanced** **Reliance on external measurement or research advice, managed by senior member of PR team or planning director**
PR brief	PR brief on the organisation, client and sector including communications audit	SWOT and PESTLE analyses	Deeper briefings with CEO, MD, functional heads including business plans, SWOT and PESTLE analysis
Audiences	Desk (secondary) research via client, organisation, online sources, way to expand on PR brief, ie 'issues' and audiences (who & what makes them 'tick'?) Pre-test messages, techniques and materials formally or informally among audience sample or via stakeholder group	Build audience profile, demographics, regional etc via e.g. Census data, online data Omnibus (low cost) surveys to discover more about audience characteristics Role play within your own organisation to establish likely attitudes, needs and wants of target group; characterise audience via pen portraits and descriptors	Commission qualitative research (i.e. groups) to explore attitudes and issues among target groups and to pre-test concepts and messages and validate / quantify hunches; or track trends through diary panels Benchmark current audience opinions and behaviours

Online and traditional media	Compile media/blogger list via published guides and online research Brief on advertising and other communication channels including schedules (re: respective PR / advertising roles and timings) Media measurement: Basic self administered system based on Toolkit and five-step RPM principles	Media planning via publishers and broadcast media packs; pinpoint key titles/journalists Online communities and forum sites Higher value self-administered system with advice from media measurement specialist, or using desk-top product	Audit to establish standing with journalists/bloggers and requirements to meet PR objectives Media planning via client / organisation advertising agency media planning / buying depts. for optimum schedule and PR/advertising split Buy dedicated databases Bought in measurement service including analysis of coverage, audience profiling for more accurate media and online selection, results against benchmarks and opinion / behaviour change.

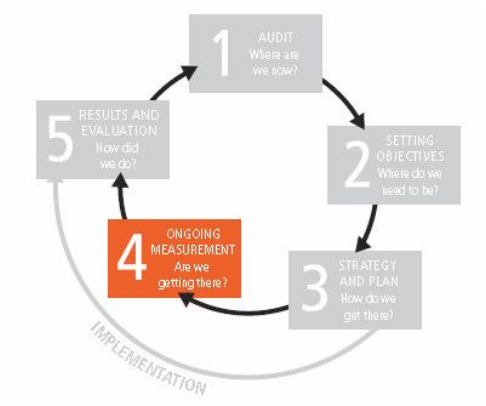
Content of this 'menu' is intended to build incrementally, ie all information in 'Basic' provides a basis for 'Intermediate', which in turns feeds into 'Advanced'. To some extent, users can 'pick and mix' but it is not possible, for example, to derive detailed Outcomes such as behaviour change without a systematic construct based on sound and comprehensive information (Inputs) and measurement at Basic and Intermediate levels (ie Outputs and / or Out-takes)

Commonly Used Research

Here are four research methods frequently used to inform a PR brief or 'put flesh on the bones'. Each is one of a 'pair' – it is important to distinguish:

Secondary and Primary Research	
Desk (secondary) research • Client or organisation's own research (customer satisfaction levels, inquiries, sales patterns, sector/competitors, etc) • Literature (client, organisation or other published) • Online conversations, press cuttings, broadcast monitors, anecdotal feedback, observation, online, libraries and other public sources • Trade and business associations • Government websites • Online communities	**Original (primary) research** • Qualitative research to define issues, validate hunches, trigger ideas • Quantitative research to define extent of problems and issues, resulting in (among others) benchmarks e.g. awareness (of reputation, services, brands), stakeholder attitudes, behaviour and understanding of key messages, media attitudes and staff morale
Qualitative and Quantitative Research	
Qualitative research soft: views, feelings Subject, in-depth study of people's views and behaviour. Moves understanding from preconceptions to reality. Identifies issue, tests concepts and materials. May need quantitative research to define conclusions	**Quantitative research hard: numbers** Objective study in which same questions are asked of representative audience. Trends can be tracked over time. Sample size: 200-1,000 depending on task and extent of reliability required.
Examples • Focus groups • Observation • Depth interviews	Examples • Polls • Surveys • Studies
Note: Best done with skilled researcher to conduct and analyse results. Can be done informally in-house but with no statistical validity	Note: Use a market research company for greater reliability and credibility – especially to generate topics for media publicity.

Step 4: Measurement - Are We Getting There?



Public relations is sometimes about communicating a simple message quickly but more typically its role is to influence opinion, change attitudes and behaviour, to listen, gather input and feedback information. Because that happens over time, it is possible to check progress 'as you go', at a particular point in the campaign as well as at the end. The advantage is that it enables a mid-course correction to be made if required.

This applies to all PR practice but bear in mind that a simple measurement of Output will only indicate what audience you had the potential to reach. More detailed analysis is needed to assess reach, and more still to discover what impact the message had on the recipients. Online responses can give insight here.

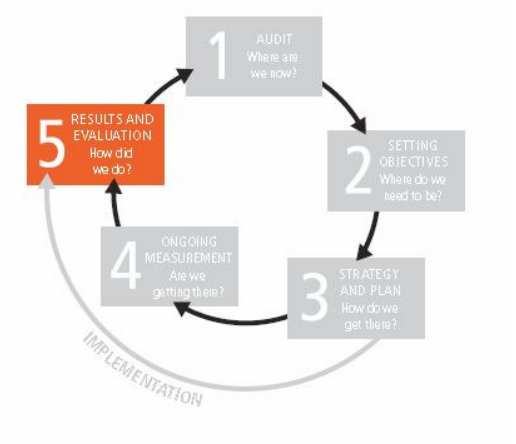
Some questions to ask at this stage and examples of possible actions:

How does the coverage to date compare with the objectives set at the start (this is an output focused question)?

Media coverage and online discussions, feedback has been heavy but analysis shows that several journalists / bloggers have chosen to focus on aspects of the story that are not the priority:	**Possible responses:** Go back to the research and facts gathered in Step 1 (Audit). Do they contain information that could 'refresh' the campaign and enable you to develop new angles for journalists / bloggers? Do target audiences (Step 2) and information gleaned during formal or informal Out-take research (Step 3) enable you to develop a 'progress' type story to re-engage? Do you need to feed the responses into a message review?
The campaign is not influencing inquiries or sales in the way planned	**Possible responses:** Study (with the client / organisation) the pattern of inquiries / sales to try to discover where, if at all, PR is having an effect and adjust content accordingly. Isolate other causes: was it realistic to expect PR to generate inquiries / sales; is the service or product not delivering against expectations; is the way in which inquiries/sales are being compared

	with PR realistic?
Research and planning have paid off and coverage and online conversations are in the right places with the right message	**Possible responses:** Simply stay on course and continue to monitor results. This is now a piece of the 'success jigsaw' that can be usefully fed back into the process next time.

Step 5: Results and Evaluation – How Did We Do?



With a formal planning process, a direct comparison can be made between the objectives and the results. The more precise the objectives the easier it is to quantify the outcome and determine the return on the PR investment and influence on core business strategy.

A large volume of apparently 'favourable' media coverage or positive conversations with other influencers and stakeholders would only represent a successful outcome if it satisfied the communications objectives agreed at the start of the campaign. If those objectives were to achieve a measurable shift in attitude or behaviour, for example, even quite sophisticated media measurement would not provide that information. A successful outcome for a pressure group lobbying to change government policy would be the policy change, not positive media coverage that might have swayed government opinion.

'Level substitution'- typically confusing Outcome (opinion or behaviour change) with Output (evidence that a message was 'issued') is one of the commonest mistakes in the measurement process. That is not to say that we should not analyse outputs – that too is important and discussed in more detail below – but the focus in this step of the process should be on evaluating the outcomes of PR activity.

The most obvious answer to the question, 'how did we do?' is a definitive result against a set objective. Also of value is the capture of information and experience gained to feed into research, planning and measurement process next time, such as:

- How could we create a better brief or cover information gaps?
- What information (about the organisation, sector etc) could avoid reinventing wheels or be used to create better benchmarks?
- How realistic were the objectives and the strategy?
- Which tactics worked best?
- What has the feedback been from our audiences and can this help the organisation improve or enhance it products / services / interactions.

A planned and research-based approach to communications can also be an important tool or a source of intelligence with a value to the organisation beyond that of PR.

Media Output Measurement

This section, compiled with the help of AMEC members, Investor Dynamics and Media Measurement, describes the process of media coverage analysis – an output of many PR campaigns.

'Media' is generally interpreted as press, radio, TV and the Web, but it also extends to any published material such as report and accounts, government publications and news wires. Media measurement can be conducted on its own or in conjunction with other forms of research – for example, interviews with target audiences to see to what extent media relations has influenced levels of awareness or opinion.

However, coverage on its own, whether it is traditional media or online, is of limited value. It is only when coverage is appraised in a systematic way, and according to a pre-agreed brief, that it has meaning. However, to have true meaning, output analysis should be linked to outcomes (the impact on the organisation). The approach should be repeatable, robust and relevant to the context of the organisation's needs. It should be simple and understandable.

The analysis of media coverage is a form of business intelligence that provides a systematic analysis of an organisation's reputation, its products and services or those of peer companies, as reported in the media. It condenses quantitative and qualitative information into actionable insights. It also enables:

- The analysis of media cuttings and transcripts to create a media coverage benchmark for a new campaign
- The development of a 'forward radar' by identifying trends in coverage such as indication of future issues or market intelligence of value to the organisation
- They study of the total media profile of identified competitors.

Common Terms in Media Coverage Analysis

Below are common media coverage analysis terms. Many organisations commission media measurement companies to produce regular reports based on the analysis terms below, depending on the needs of the organisation:

Source: The source and whether the item was client or media-originated, and the author

Channel: When and where the item appeared: press, radio, TV, online, social media, other publication; news story, feature, regular column, picture caption story, etc

Reach / **Readership** / **Circulation:** A quantitative measure appropriate to the project and to the medium, reflective of the number of people that had been exposed to relevant material. A range of different reach measures are used across print, broadcast and online media

Significance: Relevance of the media to the target audience; e.g. Tier 1 audience; circulation / viewership

Quantitative Terms

Size: Size of the content, by a measure appropriate to the medium (e.g. print, broadcast or online)

Prominence: Whether the product or organisation was mentioned in the headline, top 20 per cent of the item, bottom 80 per cent etc

Share of voice: Of the total amount of coverage of a particular topic, the percentage devoted to the product or company as well as to competitors and other organisations mentioned

Visual impact: Whether content was accompanied with relevant pictorial, photographs, illustrations, TV context.

Qualitative Terms

Topics or Messages: Issues covered – the main topic and subsidiary themes, whether prescriptive (e.g. relating to desired 'key messages') or diagnostic (e.g. reflective of natural or unprompted discussion themes)

Tonality / Sentiment / Favourability: Tone of the coverage, balance and degree of favourability. The extent to which the audience is likely to have felt positive, negative or neutral as a result.

Other Terms

Cost per thousand: The cost of advertising for each 1,000 homes reached by radio or television for each 1,000 copies of a publication, or for each 1,000 potential viewers of an outdoor advertisement

Opportunities to see (OTS): Generally equivalent to the gross circulation numbers (all added together). In advertising, OTS is interpreted as the number of occasions that a particular audience has the potential to view a message or issue.

Readership: Number of people who read each issue on average. Readership is not audited. It is more reliable to use National Readership Survey and not rely on a multiplier to estimate audited figures of readers per copy

The Barcelona Principles and AVEs

The CIPR attended the European Summit organised by AMEC and the Institute for Public Relations and endorsed the Barcelona Principles.

The Barcelona Principles are a very significant step forward in developing standards and professionalising the measurement of public relations by focusing on outcomes rather than outputs. The Principles are:

1. Importance of goal setting and measurement
2. Measuring the effect on outcomes is preferred to measuring outputs
3. The effect on business results can and should be measured where possible
4. Media measurement requires quantity and quality
5. **AVEs are not the value of PR**
6. Social media can and should be measured
7. Transparency and replicability are paramount to sound measurement.

Principle 5 – AVEs are not the value of Public Relations – was the most significant in terms of how public relations practitioners should approach the measurement of PR campaigns. Multipliers intended to reflect a greater media cost for earned versus paid media should never be applied.

Following agreement of the Barcelona Principles framework, AMEC has set up two taskforces to find the answers to two questions based on the Barcelona Principles:

1. What are the "validated metrics" to replace AVEs?
2. How do you get started in measuring social media, and what are the definitions of relevant metrics?

The CIPR will be inputting into the consultation on validated metrics in November 2010 and will be reporting back to Members on the outcomes from the consultation as an addition to this guidance.

Measuring Social Media

In March 2011, the CIPR Social Media Measurement Group developed detailed guidance on social media measurement. It draws together the CIPR's best practice insights and the Association for Measurement and Evaluation of Communication (AMEC) valid metrics highlighted at their London conference, November 2010. This guidance provides members with the most up to date thinking on social media measurement. Appendix B contains a full version of this guidance.

Why Measure Social Media Activity

Social media is having a profound impact on PR practice, how we influence, communicate and engage with our publics, internally and externally. The challenge for PR practitioners is how to identify, track and analyse the thousands of conversations, tweets, posts, comments and other content about organisations, the issues that impact them, or their markets, competitors, products or services. But it is not just about tracking, or trying to understand how influential a particular commentator or participant is. It is about identifying what conversations the organisation should participate in (or initiate) and understanding how all of these interactions and mentions (the 'outputs') impact the organisation. In other words, what impact (outcomes) do these outputs have on the organisation's goals?

Outcomes, Not Outputs

In these guidelines, we have referred to the Barcelona Principles. The fourth principle is that 'social media can and should be measured' followed by 'measuring outcomes is preferred to measuring media results (outputs)'. In other words, the principles that apply to online are the same as researching, planning and measuring what many practitioners categorise as 'traditional' public relations activity, which we have discussed in detail in the updated guidance.

At first glance, the Web appears to be the holy grail of PR evaluation. A piece of content was viewed or it wasn't. A link was followed or it wasn't. Either someone decided to 'like it' or 'become a fan' or 'click it' or rate it, or they did not. Someone may have commented positively in response to a blog post or indeed posted positively about your organisation or its products. There may be buzz on Twitter about your organisation and hundreds of conversations about your brands. All of these things should be tracked and analysed as they may be outputs of your PR efforts and impact your organisation's reputation. By tracking and analysing these outputs, organisations can gain an insight into influencer and audience perception and behaviour, which then feeds into research and planning of PR activity.

How Can Media Monitoring Tools Help?

Practitioners have at their disposal a wide range of social media monitoring tools (sometimes called Social Web Analytics, listening platforms, social media analytics, social marketing analytics), via media evaluation companies or tool providers that can deliver the following:

- Track blogs, forums, comments, tweets, online news, social networks and video for mentions of your organisation or client and competitors
- Analyse these mentions and produce reports that summarise the number of Twitter followers, comment counts, tweet counts, retweets, @replies, DMs, comments, ratings, YouTube comments / ratings, media type and sentiment (positive, neutral, negative)
- Segment this data by geography, media type, language and identify links and sources, or segment by keywords
- Present this information in various reporting formats, including 'dashboards' that summarise key data points.

This type of analysis can help to inform the PR programme, by identifying what people are saying about your organisation or client and key issues and trends, to track active commentators; user responses; likes, comments and actions.

The CIPR, AMEC and other bodies are working to identify ways in which output analysis (such as described above) can be linked to outcomes, as this is the real measure of the success of online PR activity, so for example, social media engagement for commercial organisations that leads to the following: rating-comment-interaction-purchase-recommendation.

The types of outcomes that could be possible, if different influences can be isolated (especially difficult when there is an integrated communications campaign - a challenge that has yet to be solved):

- Did ratings or recommendations lead to an increase in sales? Or requests for further information?
- Did positive customer satisfaction scores or comments lead to an increase in sales or sales queries?
- If a PR campaign led to increased web traffic, what was the result of this traffic? More queries / sales / downloads / contributions to a campaign / signatures on a petition / comments for a public consultation?
- Did online comments provide feedback that has been used to inform strategy / improve products or services?
- Have perceptions or awareness levels changed as a result? Has this led to greater engagement between an organisation and its publics / support for initiatives / changes in behaviour?

Influence & Authority

Metrics such as the number of twitter followers, Facebook friends do not measure influence per se (a participant with 60 twitter followers may be more influential in terms of your audiences than a participant with 6,000 followers for example). It is important not to confuse popularity with influence. Therefore, as with traditional public relations campaigns, it is essential to try to understand and identify those who influence your target audiences, for example:

- Are your customers amongst your Twitter followers or Facebook friends?
- Are those media contacts that have influence quoting or linking to particular bloggers or twitterers?
- Does the journalist / blogger / commentator / twitterer have an impact on purchasing decisions through recognised authority (in the case of a journalist or blogger for example) or through consumer reviews or by recommendations to family and friends? It is important to note that authority is not a proxy for influence
- Does the journalist / blogger / commentator have authority? For example, a tool such as Technorati will give an influence score based on the number of blogs linking to a particular blog
- The number of people who point to a journalist, blogger or commentator is another indicator of authority.

The growth in social media has led to a raft of products and tools claiming to measure influence. Practitioners should be clear that some of these tools have opaque ways of measuring influence that may provide little or no insight into real influence, for example:

Tools, including many free tools, which are based on influence 'calculations' that result in 'scores', for example: 'likelihoods that your brand is being discussed', ratios of positive vs. negative comments (whilst this is a useful measure, there must be an explanation of how the tool was able to understand sentiment), authors divided by total number of mentions etc. Simply, these scores and calculations may be flawed and not help an organisation understand influence.

Social Media Monitoring - Glossary of Terms	
Social media monitoring / Social media listening / Buzz monitoring	The practice of listening to the online conversations relating to a brand, monitoring and reacting to what is being said as well as where it is being said, who is saying it and how influential they are.
Influence	The power of one individual to affect the behaviour, perceptions, attitudes or opinions of others. In social media terms, influence is often calculated from a combination of reach and resonance.
Influencer	An individual who has the power to substantially influence the behaviour or opinions of others, often due to perceived superior power, wealth, social status, expertise or intellect.
Sentiment	The attitude of an online user towards a person, brand, product etc. as expressed online.
Sentiment scoring	A methodology for showing how people feel about a subject or brand, often expressed in simple terms as positive, negative or neutral.
Human sentiment analysis	Human (or manual) analysis of a comment or post, aiming to determine the attitude of the speaker towards a brand or topic.
Automated sentiment analysis	Analysis of a comment or post, aiming to determine the attitude of the speaker towards a brand or topic.
Reputation management	The process of monitoring a brand's actions and others' opinions towards these actions in order to identify actions which create a positive response and those which create a negative response. The brand can then act (or react); taking actions, which it believes, will create positive responses in order to enhance its reputation.
Monitoring platforms	Online tools or services used for monitoring social media, often gathering data from multiple sources, to enable individuals and brands to track online conversations and make real-time interventions.
Boolean Queries	A form of words used to define the precise terms of a search query, for use either in search engines or social media monitoring tools. For example, "Orange" AND "mobile" NOT "fruit" would produce results that include the words "Orange" and "mobile", but exclude those containing the word "fruit". Longer queries enhance data accuracy but can require the skills of professional analysts.
Dashboard	A user-friendly administration page that enables non-technical users to view and manipulate the data produced by a monitoring platform. Dashboards sometimes also allow users to create and manipulate data queries.
Mapping	Data mapping is a way of representing the relationships between data points visually, making it easier to understand. Mapping social media connections can highlight the common connection points - i.e. highly connected individuals.

Data mining	The process of filtering and analysing data in order to identify patterns.
Reach	The number of people that are exposed to your content once it is posted online. Reach is generally measured in simple terms, such as Followers (Twitter), Fans (Facebook), views (YouTube) or visitors (blogs).
Conversations	Social media conversations can be defined as any form of written online interaction. This includes a series of related comments, status updates, tweets or forum posts. The "Conversation" on a specific topic is measured as the total number of mentions of the defined keywords for that topic.
Keyword	"Keyword" is term taken from search engine optimisation (SEO). Any word or phrase that is being targeted for optimisation (in SEO) or used in a search query (in monitoring and analytics) is a keyword.
Share of voice	"Share of Voice is a brand's advertising weight expressed as a percentage of a defined total market or market segment in a given time period. The weight is usually defined in terms of expenditure, ratings, pages, poster sites etc." (Wikipedia)
Share of conversation	Share of Conversation is the percentage of the total conversation within a specific industry sector on a specific topic in a given time period that refers to the brand. This percentage is usually measured against competitors operating in the same industry.
Natural language processing	"Natural Language Processing" (NLP) is used by linguistics experts to enable computers to extract meaning, including sentiment and mood, from human language. Many social media monitoring services rely on NLP to make their data filtering more accurate.
Tone	In social media terms, "tone" is used as a measure of sentiment, i.e. positive, neutral or negative.
Mood	Not to be confused with "sentiment" or "tone", which related to the feelings expressed in a piece of content, "mood" is descriptive of the state of mind of the author. It is often represented by smiles :)
Resonance	A measure of content popularity based on how many times and who shares it. Made popular by Twitters' "Promoted Tweets", which are rated on a complex measurement of resonance.

PR Measurement & The Organisation - Tips

1. PR practitioners need to know how to speak to non-PR people such as members of the board or other teams within an organisation. It is important to understand the language that the board or colleagues use and what measures they use to gauge the success of the activities they undertake. It could be that the board requires a digest of evaluation – perhaps in the form of a 'dashboard' of key metrics - rather than a detailed written report

2. Clear links should be established between organisational objectives and PR outcomes so that those non-PR people can immediately understand how PR has help the organisation to achieve what it has set out to achieve

3. Practitioners should take part in business skills training so they are able to discuss PR outcomes and distil this information throughout the organisation, in a format and language that other teams can understand and engage with

4. It is likely that other functions within an organisation are investing in evaluation. For example, in sales, marketing or customer service. PR practitioners should speak to colleagues to indentify what measures are in place throughout the organisation and what data is available that might be able to support PR outcomes (for example, changes in customer behaviour as a result of a PR campaign or impacts on sales). This should also extend to partners if the organisation uses partners to conduct business

5. Where possible, PR practitioners should investigate the development of shared research and evaluation resources and budgets across multiple functions. This can help to support investment in PR evaluation where typically the evaluation budget is not ring-fenced

6. As above, it is likely that other functions will be investing in research activities that may be of value to the PR campaign planning and evaluation process. Speak to colleagues to identify areas of collaboration and mutual interest

7. How the board measures performance and what they define as success vs. organisational objectives is key to how PR measurement is framed. This also ties into issues of organisational culture and requires a detailed understanding of the organisation's business plan. PR practitioners should, wherever possible, have a detailed understanding of organisational goals and strategies so that public relations campaigns can be aligned and evaluation contextualised accordingly

8. For organisations that employ more than one PR consultancy or have different in-house teams (for example, investor relations, trade PR, corporate PR), collaboration and integrated planning and measurement is key, particularly if these consultancies or teams report into different Directors

9. As many PR practitioners report into the marketing function, it is important to consider the measurement tools marketers are familiar with and to develop an integrated approach to campaign evaluation

10. If the organisation produces an annual report, ensure that public relations impact / outcomes are included. Reputation is a significant intangible asset and whilst there are no financial reporting standards (aside from brand / goodwill on acquisition), reputational value can be articulated in terms of the outcomes measured as part of the campaign.

Appendix A: Insourcing or Outsourcing Media Measurement; Media Measurement Q&A and How to Select a Media Measurement Company

Insourcing or Outsourcing Media Measurement?

The Case for Insourcing

Many independent PR practitioners, smaller PR consultancies and in-house departments find it difficult to build research into project budgets. They feel that they have little option but to "insource", often using existing staff, specialist software and online method guides.

If well planned, resourced and consistently executed, Insourcing is a perfectly valid approach, and can deliver robust and actionable results. The key phrase is "well planned". While technology increasingly provides the means to process data more efficiently, it cannot short-cut the project planning, programme management and quality control that are necessary to ensure that research activity produces findings that are robust, reliable and actionable.

For this reason, it is vital that careful consideration is given to Insourcing. Questions to be asked are:

- What are the objectives of the media research, and how will our proposed research programme support them?
- Have we conducted a cost-benefit analysis, to assess the scale and opportunity cost created by Insourcing?
- Can we reliably commit the internal resources needed to plan and execute the research to an appropriate standard?
- Do we anticipate objections from clients or other stakeholders to an insource approach? If so, can they be successfully addressed?

If the answer to any of these questions is 'no', or unclear, then serious consideration should be given to consultation with a specialist AMEC member company for advice and / or execution.

The Case for Outsourcing

Specialist research agencies engage at a number of levels, ranging from consulting and advisory work to help plan and kick start research programmes, to full service, ongoing management and execution of research programmes.

While Insourcing can be effective, it can be a resource-drain, and a distraction from core activities. It can also provide difficult methodological challenges in cases where communications goals are subtle and hard to measure, or audiences hard to define.

With these factors in mind, outsourcing media analysis to a specialist third party creates a number of benefits:

- Expertise: in the design and execution of measurement programmes (both in general, and through the application of proprietary methodologies), in specific industry sectors, in maximising the value created by measurement (e.g. by advising on ways to integrate results with market research; web analytics or other research streams), and in the use of research to make a case for investment
- Time-efficiency: in managing the core processes of media content analysis, and in delivering agreed outcomes to a consistent project budget
- Reliability: in ensuring that resource-in-depth is available to maintain deliverables and deadlines in the face of unexpected circumstances
- Objectivity: providing the decision-supporting credibility created by a third-party measurement specialist.

For cases in which there is uncertainty over project scope, methodology or programme design or availability / reliability of manpower, then a consultation with a third party is recommended.

Media Measurement Questions and Answers

What is an 'opportunity to see' (OTS)?

'Opportunities to see' is an output measure borrowed from advertising. Its application in a PR context causes considerable confusion. OTS is the potential number of occasions an audience (readers / listeners / viewers) can view a relevant item or message about a company in any given period. Figures are established using circulation / audience data, for example, the sum of circulation multiplied by the number of items, mentions, photographs or headlines.

For example:

Company X was mentioned in four separate articles in The Glasgow Herald in May 2003. The circulation of The Glasgow Herald is 96,000. The OTS of relevant articles about Company X would therefore be 384,000 (96,000 x 4). However, this does not give the organisation any view of the impact of OTS (the outcome).

Source: Media Measurement

OTS can also be calculated for specific messages within any given period. For example, in the case of the Glasgow Herald, if Message 1 about Company X were evident in only three of the four articles, the OTS of Message 1 would be 288,000 (96,000 x 3). The same calculation can also be used for tone.

OTS should not be confused with readership. Readership figures are audited by Jicreg and NRS and based on the average number and type (gender, age and social group) of people

that read a publication. One good definition of how readership is audited is to ask, 'if one person buys a copy of The Sun, how many other people might pick that copy up and read it before it is disposed of'.

'OTS' becomes more useful when a net figure (expressed as a percentage of reach) and frequency of exposure to the item are added into the equation. The danger of using gross impressions (combined circulations / audience numbers) in OTS calculations is that the gross figure can run into millions more than the UK population. An 'OTS' of 60 million could mean that everyone has been reached once or that ten per cent has been reached ten times. It is important to know which it is because, in the same way that advertisers want to know what weight of exposure they need for TV advertising, there are desirable thresholds for PR.

What can measurement do beyond analysing media clips?

The short answer is, a great deal.

If PR is the only communication, the target audience tightly defined and the desired outcome a simple one such as number of visitors, it is reasonable to make a direct causal link. Generally, Outcome is impossible to measure with any accuracy without the use of a representative sample size and the skill to establish a cause and effect link. This will invariably mean using a media measurement specialist with that capability or another external market research sources, together with internal intelligence from customer service or sales teams. Greater accuracy can also be achieved by including media consumption questions in a tracking study to identify those who were more likely to have been exposed to PR than those who were not – at a spontaneous level, most people are unaware of the source of their information or simply confuse 'advertising' with 'articles, unless they are active in particular online communities.

By balancing samples carefully so that other stimuli are similar (e.g. equal advertising exposure to both groups) it is possible to tease out the PR effect with a high degree of accuracy. The influence of PR on an audience is also affected by time lag. For example, while a story appearing in a regional daily newspaper is 'immediate', in the case of some consumer magazines, a high proportion of the readership can take place several weeks after publication.

Other roles of measurement include:

- Analysing results to use as a benchmark for a new campaign
- Becoming a 'forward radar'. Identifying trends and monitoring criticism in coverage or online can act as an early indicator of future issues
- Studying the competition and role model organisations as represented in the media or online
- Providing information on media titles, readership and online audience profiles so media and online content can be fine-tuned

- Feeding back into organisation planning activities.
- Identifying why stakeholders engage and interact with your brand

Can you 'value' staying out of the media?

It is extremely difficult, if not impossible, to put a 'value' on avoiding negative media coverage or online conversations. However, it is possible to use conventional media measurement techniques in reverse in order to assess the impact that negative coverage might have had.

Before doing so, it is worth asking whether the effort and cost is worthwhile since merely staying out of the media may be the desired result.

Two other perspectives: A company in the public sector that had come in for media criticism decided that the weight of negative stories (some of it unfair) was such that for a period of time a 'neutral' rating was a positive outcome;

A large public corporation, also the victim of media criticism (much of it justified), went even further and adopted a media relations strategy of avoiding coverage altogether because it felt it was in a 'no win' situation. However, PR practitioners should challenge the premise that staying out of the media is a worthy achievement. The right solution is engagement in a conversation, transparency and clear communications of actions, feedback and intent.

Can you isolate 'the PR effect' from advertising?

There are many examples where the 'PR' surrounding an advertisement – usually amidst a controversy – creates more attention than the advertisement, whether or not it was pre-planned.

A thorough brief and a planned response is the best way to answer the question 'PR or advertising?' Advertising will sometimes already be in place in which case the brief provides a framework for working out complementary roles for both disciplines. If advertising and PR are running in parallel and performing complementary rather than 'competing' roles, metrics exist to 'disaggregate' the two. It is not something that most PR practitioners could tackle without considerable experience and resources.

Can PR measurement deliver a return on investment (ROI)?

While ROI in a strict sense is understood as a hard financial measure, expressed as the sum of revenue generated by an activity, less the costs incurred by that activity, the expression has on occasion come to be understood in a broader sense. With respect to PR, it is best to think about "ROI" in the sense of making the argument for PR in terms of hard and soft outcomes.

Measurement can prove evidence of a return on the investment in PR, but it is important to clearly define ahead of time what is meant by 'return'– for example sales, number of visitors, or inquiries?

Where PR is the only communication being used to promote or 'sell' a product or service, it is reasonable to assume that PR can take a large share of the credit for any sales (factors such as word of mouth may play a part). In this case, the 'return' could be the revenue generated or, more usefully, the profit – typically the operating (or pre-tax) profit. This principle can be applied with further confidence in social-media based campaigns, where tracking data from web analytics software can prove in a direct but limited way the journey from exposure to sale.

The "return" in ROI might also (and importantly) be defined in the sense of 'softer' measures such as a shift in perception or awareness of a brand or service. As with all forms of measurement, an expression of performance in the sense of ROI should always be made according to clear criteria fully understood by all parties ahead of time.

What is the best way to secure support for measurement resources and investment?

Senior management typically do not want large reports. They want fast reading dashboard type reports which measure against agreed corporate objectives and which provide insights on which management can act.

Measurement enhances the value of public relations because it will show whether and to what extent PR has contributed towards the organisation's goals. The day of the press cuttings book as an indicator of success is over!

It does not have to cost a great deal – good planning increases accuracy in targeting. Much information internally and externally – is free. The ability to report accurately and consistently raises the credibility of PR internally – and of those who champion PR – and demonstrates its strategic contribution to core business strategy

Measurement can yield intelligence of value outside the remit of PR, for example comparison tracking of competitors can tell a client company what rival organisations are doing and how media or consumers are interpreting this.

Programme measurement is not an add-on but an integral part of the function of public relations.

Measurement can:

- Provide a low risk and low cost test-bed for early testing and iteration of messages and campaigns via, for example, social media
- Provide an early warning indicator of issues, for example by tracking key customers and other channels
- Encourage – and help enforce – standard processes for communications
- Catalyse – and again help enforce – consistent messaging within and across the organisation through using a common analysis framework to assess communications coherence

- Help establish a positive spirit of competition between different groups – whether they are regional teams or brands teams of some other team grouping

How to Select and Brief a Media Measurement Company

The brief for a measurement company – or for an in-house team carrying out its own measurement – should include the following:

- Aims and objectives of PR and how they relate to organisational goals. What are the criteria by which success will be judged and how will this information be used? The measurement firm will help define objectives and design measurement to complement other research
- What audiences do you need to reach?
- Selecting the right print, broadcast, online or other media is critical in targeting either a tightly defined target group or a wider universe
- Where are you starting from? Are there existing benchmarks from previous media measurement, perceptions on the organisation or its competitors, or issues that might impact on PR? Step 1 of the research, planning and measurement process provides all this information
- What key messages do you want to track? If possible, list them by audience. The media measurement firm can help determine what is 'favourable' or 'unfavourable' and whether messages are actually measurable
- Which media are most relevant? Getting in the 'nationals' is not the ultimate mark of success – it may be positively unhelpful, particularly if the story did not turn out as expected. Examine the objectives, messages and audiences to determine which categories of media are most relevant, or an exclusive to achieve greater target accuracy and influence over content
- What scale of coverage do you need? In which regions of the UK or countries; what media and languages? Cost is influenced by volume of items analysed and whether benchmark comparisons are involved
- Who will provide cuttings and transcripts? Do you already have this facility in-house?
- What form of analysis do you need? The media measurement firm will need to know format, frequency, degree of accuracy and who will use the information internally
- What time period? Do you want to go back in time to benchmark? How and when are resulted needed?
- What is the budget? An outside specialist may appear more 'expensive' but decide whether the PR team has the time, skills and resources to do the job and what 'price' you would put on objectivity.

Factors in choosing a supplier should include the following:

- What is their experience of similar jobs? Take up references
- What form of analysis do they use? Does this match your needs? Make sure you understand their definitions and terminology

- Who does the research? Test their business understanding and the personal chemistry – the ‘right’ person should feel like a team member, not a supplier
- What structure and media? Take advantage of the free consultancy that many firms will offer at the proposal stage
- How are findings presented? Do you need just a management summary or the detail – see a sample presentation?
- Other services? Can they provide other services such as survey research or media consultancy?
- What will they charge? If two firms quote substantially different amounts, they are probably offering different levels of service. How will charging be affected by changes in the specification and the fact that scale of media coverage will not be known in advance?

Appendix B Social Media Measurement Guidance

These guidelines will cover:

- Background
- CIPR's Research, Planning and Measurement Toolkit
- The Barcelona Principles
- Enter the Matrix: AMEC outlines 'Valid Metrics' to replace AVEs
- Social media task force guidelines
- Our critique
- Best practice – as we understand it today
- Best practice process for selecting and defining social media metrics
- Return on investment
- Bibliography

Background

Basketball legend LeBron James holds the record as the youngest player in NBA history to score 15,000 regular season points. He has also averaged 27.8 points, 7.0 assists and 7.0 rebounds per game for his career in the regular season. The 6ft 8in 'guard' was considered the most valuable player in the game in 2009 and 2010.

Great metrics? Interested? Would you have him on your team? If so, you're not alone, as the intense traditional and social media interest was evident when James' contract with Cleveland expired mid-2010.

But of course you might not be interested. Indeed, perhaps we picked basketball because it isn't commonly followed in the UK, in which case the numbers above mean next to nothing to you. You might run a football team, requiring very different 'guard' talents. Or a Formula 1 team, in which case James' height and weight might just be disadvantageous. Or perhaps you run a public relations team and the metrics here tell you nothing of James' talents in crafting communications strategy or creating outstanding tactics.

In other words, the metrics in which you will be most interested, the metrics that will prove to be most valuable to you, depend entirely on what you have set out to achieve. It appears obvious when you look at it like that. And while it may be tempting to treat public relations as homogeneous as basketball with a common, convenient set of metrics with which pundits can draw easy comparison, it is in fact more like the world of sport in general. The suitability of metrics is contingent upon such things as the sport in question, the competition, your choice of undifferentiated structure and approach, and your design of strategy – those aspects at which you seek differentiated advantage.

CIPR's Research, Planning and Measurement Toolkit

The CIPR reissued its Research, Planning and Measurement Toolkit in October 2010 – "a practical guide to research, planning and measurement – what it is and how to do it". Except the CIPR's social media measurement group decided to play cautious and reserve its contribution until March 2011.

2010 was a noisy year for social media measurement, rounding out what could surely go

down in history as the social media decade. From the blogging explosion in the early part of the decade, through to Friendster, Second Life and MySpace, to iPhone and Android apps, Facebook's almost 600 million users and the many millions using Twitter. With a later sprinkling of Foursquare and Groupon.

We have already passed the point at which the word 'consumer' no longer seems entirely appropriate, for social web participants produce, share, curate and publish as well as consume, fuelled in no small part by the massive improvement in mobile device capabilities since the advent of the original iPhone in 2007. If your marketing and communications objectives encompass such possibilities, if they pivot around engagement perhaps rather than just plain old consumption, then we need to be looking at metrics of engagement not just consumption, awareness or reach.

The public relations professional has had much to keep on top of and, to continue with our sporting metaphor, one might say the choice was between dipping your toe in the water and diving whole-heartedly into the pool. It was only the rare practitioner that got as far as time trials and scientific study of stroke technique.

2010 also witnessed some valiant attempts at crystallising this scientific study – to explore and define best practices in social media measurement. The International Association for Measurement and Evaluation of Communication (AMEC, www.amecorg.com) led the pack, and the CIPR Social Media Measurement Group particularly wanted to wait until AMEC ran its London Conference in November 2010 before publishing this guidance.

The Barcelona Principles

The CIPR Toolkit references the Barcelona Principles enshrined at the 2nd European Summit on Measurement, hosted by AMEC and the Institute for PR during the summer of 2010 (see the CIPR President's blog post at http://bit.ly/barcprinc). For your convenience, the principles are listed again here:

1. Importance of goal setting and measurement
2. Measuring the effect on outcomes is preferred to measuring outputs
3. The effect on business results can and should be measured where possible
4. Media measurement requires quantity and quality
5. AVEs are not the value of public relations
6. Social media can and should be measured
7. Transparency and replicability are paramount to sound measurement.

The summit's 200 delegates and five of the industry's leading PR and research organisations agreed to these principles by a very convincing majority vote, though it's widely understood that the third and fourth principles were the most controversial. We all knew it wasn't sufficient to knock something down Advertising Value Equivalent (AVE), as much as it deserves it, without trying to build something else in its place – and the profession was far from agreement on how to quantify social media success. AMEC's US Agency Research Leaders Group took the lead to resolve these two questions prompted by Barcelona:

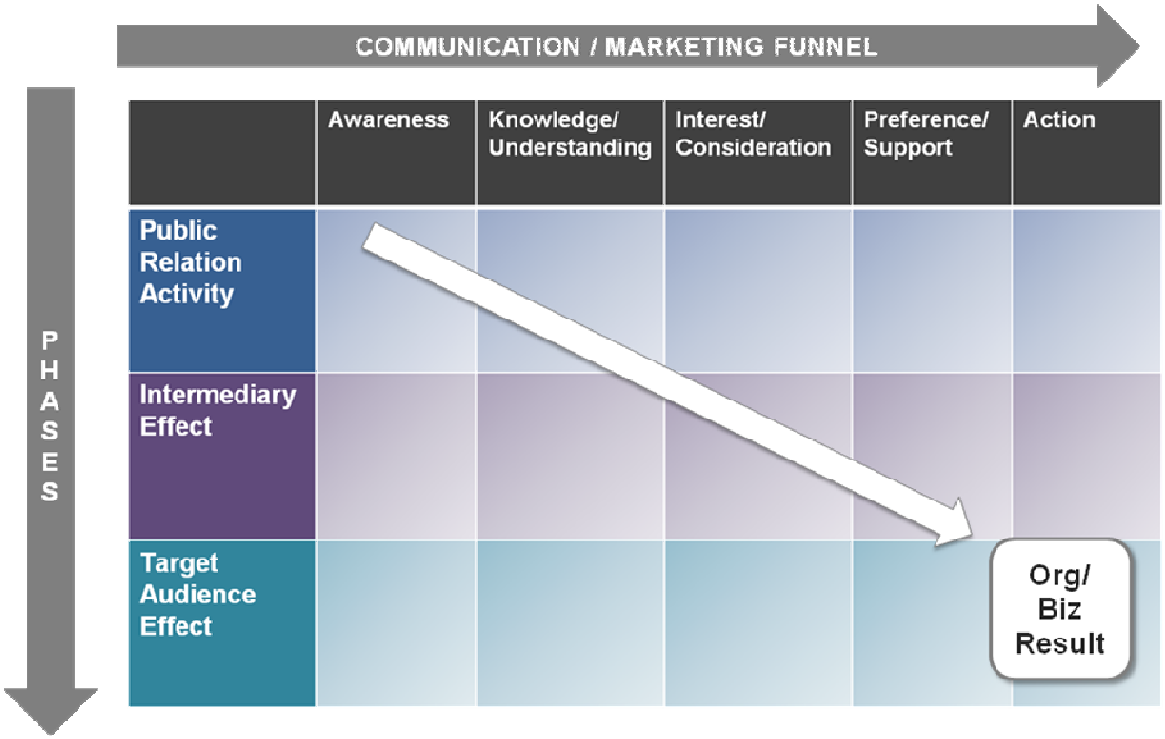
- What are the 'valid metrics' to replace AVEs?
- How do you get started in measuring social media, and what are the relevant metrics?

The task force results were previewed at IPR's 9th Annual North America Measurement Summit and then presented in depth at AMEC's November 2010 London Conference. AMECs valid metrics approach and the CIPR's input to these deliberations are discussed below. First however, it's worth emphasising the 7th principle too, particularly as it's all too easy to gloss over it.

Transparency means no black boxes. Period. You must be able to see the query you are giving the analytics service and its translation and machining of it. You must be able to export the query, data and associated analyses somehow. You must understand exactly how the service is working, to the point of appreciating the approaches to manifest (intended) and latent (recognised) analysis, and natural language processing. Without such insight, you simply have neither transparency nor replicability. As Philip Sheldrake pointed out in a June 2010 blog post and New Media Age article, "Making sense of social analytics", web analytics went through this same progression 10 years earlier.

Enter the Matrix: AMEC outlines 'Valid Metrics' to replace AVEs

Ruth Pestana, Worldwide Director, strategic services Hill & Knowlton and chair of AMEC's taskforce on valid metrics, presented the AMEC valid metrics approach at their London Conference in November 2010. The thoughtfully developed grid lays out the phases of public relations activity along the y-axis and the so-called marketing funnel along the x-axis. The objective is then portrayed as that which lies at the final stage of PR activity, the target audience effect, and the final stage of the marketing funnel, action. This destination cell is labelled Organisation / Business Result.



Our group endorses the direction this work is taking the industry, particularly the determination to accrue valuable and practical meaning to metrics by designing them to relate as closely as possible to intended organisational goals. However, we have some concerns regarding the similarity of the axes here. Specifically, what different meaning is conveyed by target audience effect if it's not an action of some sort?

Tim Marklein, Executive VP measurement &strategy, Weber Shandwick, and chair of AMEC's taskforce on social media measurement, presented the following points on key metrics, issues and guidelines for social media measurement. Commentary from our group is in parentheses:

Prior Work: Barcelona Principle #6

- Social media measurement is a discipline, not a tool or a 'single metric'
- Organisations need clearly defined goals and outcomes for social media (that can be meaningfully allocated to extant business functions)
- Media content analysis should be supplemented by web and search analytics, sales and CRM data, survey data and other methods
- Evaluating quality and quantity is critical, just as it is with conventional media
- Measurement must focus on 'conversation' and 'communities' not just 'coverage'
- Understanding reach and influence is important, but existing sources are not accessible, transparent or consistent enough to be reliable; experimentation and testing are key to success.

Social media task force guidelines

Recommendation #1. Focus on Outcomes

- Need to define outcomes and goals in advance
- Can't define or manage purely within PR / communications silos
- Outcomes will likely span multiple business goals (and you should map outcomes to suggested actions – avoid the awkward 'so what' challenge)

Recommendation #2. Starter Set of KPIs

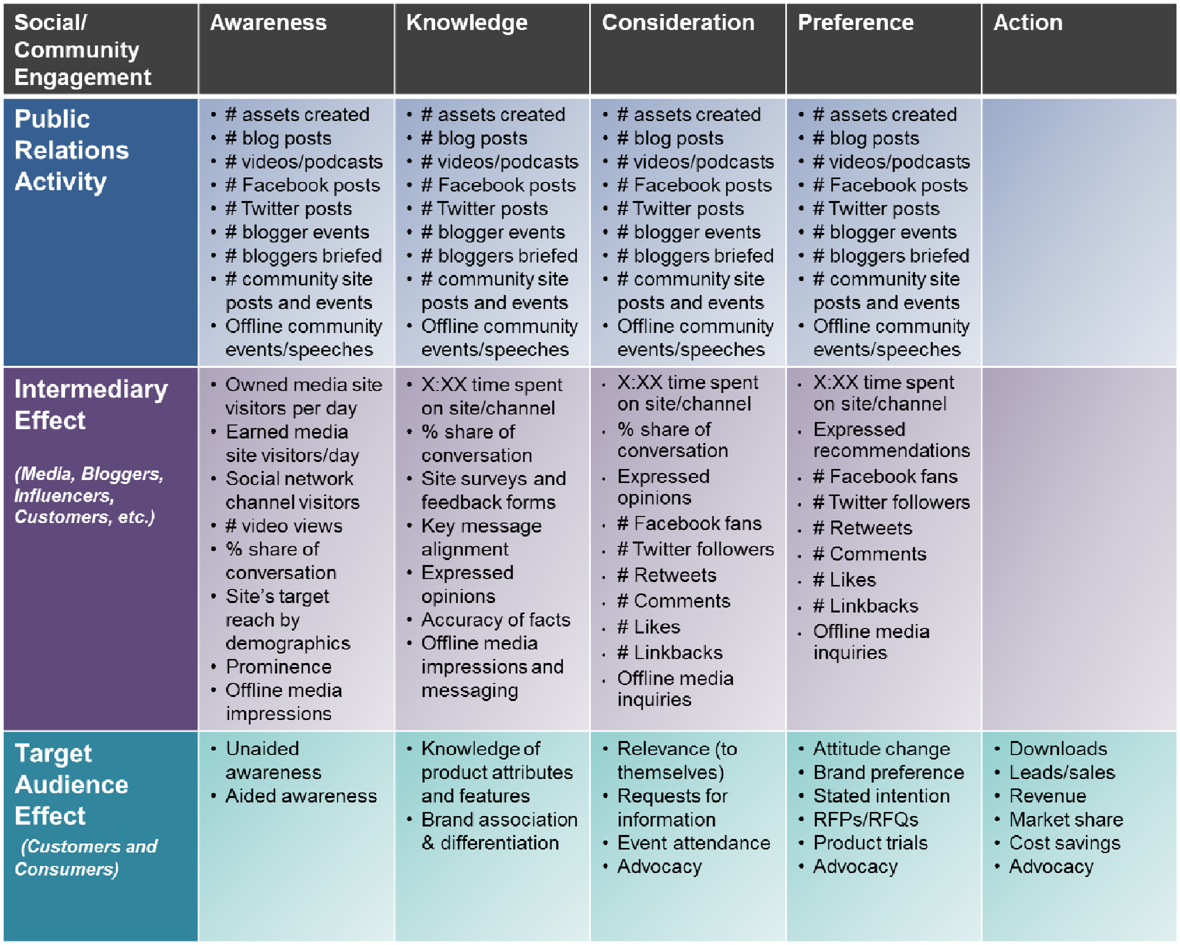
- Basic quantitative data is easy to measure – but not terribly valuable
- Need to get into more quality and context, similar to media analysis
- Fits into 'valid metrics' grids from post-AVE task force (see sample below)

Recommendation #3. Influence Rating / Ranking

- 'Influence' and 'authority' are domain-dependent (eg an individual may have authority in British fashions but none in tractor racing)
- 'Influence' and 'popularity' aren't the same (see Brian Solis' blog post: "Please Repeat: Influence is not Popularity")
- Influence is multi-level, online and offline (Where do we define influence?)
- Influence can change over time based on many factors

Recommendation #4. Content Sourcing

- Not all sources are created equal – know what you're getting / not getting
- Garbage in, garbage out – critical challenges for measurement
  Industry needs transparency from vendors on sourcing quality



Social/ Community Engagement	**Awareness**	**Knowledge**	**Consideration**	**Preference**	**Action**
Public Relations Activity	# assets created # blog posts # videos/podcasts # Facebook posts # Twitter posts # blogger events # bloggers briefed # community site posts and events Offline community events/speeches	# assets created # blog posts # videos/podcasts # Facebook posts # Twitter posts # blogger events # bloggers briefed # community site posts and events Offline community events/speeches	# assets created # blog posts # videos/podcasts # Facebook posts # Twitter posts # blogger events # bloggers briefed # community site posts and events Offline community events/speeches	# assets created # blog posts # videos/podcasts # Facebook posts # Twitter posts # blogger events # bloggers briefed # community site posts and events Offline community events/speeches	
Intermediary Effect ***(Media, Bloggers, Influencers, Customers, etc.)***	Owned media site visitors per day Earned media site visitors/day Social network channel visitors # video views % share of conversation Site's target reach by demographics Prominence Offline media impressions	X:XX time spent on site/channel % share of conversation Site surveys and feedback forms Key message alignment Expressed opinions Accuracy of facts Offline media impressions and messaging	X:XX time spent on site/channel % share of conversation Expressed opinions # Facebook fans # Twitter followers # Retweets # Comments # Likes # Linkbacks Offline media inquiries	X:XX time spent on site/channel Expressed recommendations # Facebook fans # Twitter followers # Retweets # Comments # Likes # Linkbacks Offline media inquiries	
Target Audience Effect ***(Customers and Consumers)***	Unaided awareness Aided awareness	Knowledge of product attributes and features Brand association & differentiation	Relevance (to themselves) Requests for information Event attendance Advocacy	Attitude change Brand preference Stated intention RFPs/RFQs Product trials Advocacy	Downloads Leads/sales Revenue Market share Cost savings Advocacy

Where does this leave us?

The CIPR Social Media Measurement Group believes this moves the industry a little further forward, but not quite where we still need to be – a conclusion we know the AMEC team shares. This remains a work in progress. We analyse the situation in a little more detail in

this section, and then present the CIPR's take on social media measurement best practice, which we're feeding back into AMEC as deliberations continue throughout 2011.

Our critique

The matrix helps move practitioners in the right direction, toward identifying metrics that are linked to intended organisational outcome. We've already pointed out that we're worried there's insufficient difference between the axes to warrant marrying one off with the other, and we intend to see if we can come up with other more productive options. Perhaps the example metrics populating the matrix cells belie the shortfalls of the matrix as it stands today, specifically why so many of them repeat across so many of the cells? In other words, does this not challenge the useful distinction of one cell from its neighbours?

We are also concerned about the phrase 'valid metrics' should it be taken by anyone to imply some kind of universal validation. There is no such thing in our opinion. Here's why.

Every organisation should have a mission (why we exist?), values (guiding behaviour), a vision (what do we want to be?), objectives (breaking down the vision) and strategy (how we intend to get there / achieve the objectives). Given that measurement isn't just the detached collection, analysis and presentation of data but a powerful management tool in itself, a powerful way to align each employee's day-to-day activities with the strategy, this cascade must continue robustly, transparently and visibly. People perform as they are measured, so the measures must drive strategically important behaviour.

And as each marketplace is unique and as your organisation is unique, your strategy will be unique. And so, therefore, will be the suite of measures you design, deploy and manage by.

On re-reading the Tim Marklein points above, you can see that he and the AMEC team appreciate this. He refers to the example metrics as simply 'starter KPIs' for example, and feels compelled to write 'valid metrics' in quotes. We continue to use the expression here to indicate a metric that is considered to be worthy of consideration. So, for the avoidance of doubt, a metric may be valid in the generic sense but unsuited to your specific needs, just as the 'assists' metric for LeBron James' performance is a valid metric, but not suitable if you're playing tennis.

Best practice – as we understand it today

The CIPR's Toolkit applies to social media and all other aspects of public relations activity. Perhaps this notion of universality is lost because we expect different things of 'social' / 'digital'. Perhaps because social media is the most nascent channel for dialogue with our publics and therefore the one most shrouded in awe, unknowns and confusion.

Here are five common myths it's worth taking time to dispel:

- Myth 1: We can measure everything digital precisely and instantly.
  Jim Sterne puts it like this: "The world of online marketing has been suffering from a delusion of precision and an expectation of exactitude."

  First, most business isn't 'done' online. The ultimate outcome / action of which you aim to convince your publics likely involves some non-digital action such as getting people to your high street store, or changing their preferred coffee shop, or test-driving a particular make of car, or recommending the movie to mates down the pub, or prescribing one pharmaceutical drug over another, or revising their approach to recycling or their regard for your stock or charitable cause.

Secondly, even when the outcome does entail the unmistakable click of the 'Buy now' button, how might one attribute this sale to all the touch points your new customer has had with your organisation and brand over the weeks or even years running up to that moment? Don't fall into the 'last-click attribution' trap (and don't let your marketing colleagues take full credit for that last click, either, when PR likely had some impact along the way).

- Myth 2: All digital metrics are useful.
  Just because you can measure it doesn't mean you should. In our opinion, this myth has possibly been the biggest distraction on the road to best practice to date.

- Myth 3: The new compound score everyone is talking about must be useful.
  Innovations such as Technorati authority, Klout score and PeerIndex ranking appear sexy on first review, but they can only be useful to you if you understand them and they are relevant to pursuing a specific strategy. And the assertion here that you must understand them is no trivial point. In our experience, practitioners do not know what the numbers represent, nor then do they know how to interpret the quantities and ensure they are not misapplied.

  This confusion can be fuelled by the purveyors of said indexes falling far short of a reasonable explanation of their machinations, either with an eye to maintaining trade secrets or perhaps lending their divinations more mystical attraction. In conclusion, one should always approach compound, proprietary measures with extreme caution, and always caveat any application accordingly. We're not saying they are useless, just that they are of no use if opaque, misunderstood or poorly applied.

- Myth 4: One metric will do.
  How useful is a speedometer without an understanding of the direction of travel? What use measuring calorie intake without quantifying exercise and other lifestyle variables? BP had a great year in 2010 if one tracks volume of mentions alone. One metric never suffices. You will need a balanced portfolio of metrics.

- Myth 5: The more followers / friends the better.
  The number of followers and friends indicates popularity, but, as Tim Marklein states, popularity is not the same as influence. Moreover, taking the number of followers / friends in isolation does not account for context or the number of faux followers and friends (for spam-like purposes).

Best practice process for selecting and defining social media metrics

Let's remind ourselves of the five-step process outlined in the CIPR's Research, Planning and Measurement Toolkit:
Step 1. Audit – Where are we now?
Step 2. Setting measurable objectives – Where do we need to be?
Step 3. Strategy and plan – How do we get there?
Step 4. Measurement and analytics – Are we getting there?
Step 5. Results and evaluation – How did we do?

Just like any other component of your PR strategy, when it comes to social media we must build an appreciation for what constitutes a measurable objective (step 2), then determine how to measure that, and then understand how exactly this metric should be wielded in advance of step 4.

When it comes to identifying the most appropriate social media metrics, we recommend that you define what exactly it is you mean by 'most appropriate' in each instance. Even

describing this in ideal terms can help achieve greater understanding of the matter at hand and help you define the eventual realistic metric and appreciate its shortcomings or limits when compared to the ideal.

You are then in a position to identify the selection of valid metrics that suit your needs, before tailoring / customising them precisely to your purposes. The bibliography here contains books featuring lists of valid metrics to help you here (particularly Jim Sterne, Katie Paine and Marshall Sponder) and you should document and communicate the rationale for and the shortcomings or limitations of the defined metrics to make sure everyone on your team is aligned. The last thing you want, having gone to this level of professional diligence, is for some over-keen colleague to misinterpret or misapply the measurements in Step 4.

Lastly, as social media is a fast-changing landscape, we recommend you apply an owner and best-before date. This date stipulates the point at which the current assumptions should be considered to be obsolete and the point at which the owner should review the whole thing.

In summary, we have broken the CIPR Toolkit's Step 2 into component steps:
2.1 Define your measurable objective
2.2 Define your benchmark set – comparative / relative
2.3 Define the ideal metrics
2.4 Identify candidate metrics that combine to best meet your ideal definition – don't try and make your metrics universal across the organisation, but apply different metrics for different audiences
2.5 Tailor each one to your specific needs, recognising its shortcomings / limits
2.6 Document these steps to make the process auditable and more easily reviewed
2.7 Set a review date and owner.

By undertaking this process, you can assure your line manager and board that high attainment of the selected metrics indicates a higher contribution to the achievement of the organisational objectives. What more could they ask for?

Return on investment

Oh yes, they could ask you to quantify the financial return on investment in social media. You cannot blame anyone for making such a request of you, but should they persist after reading the CIPR Toolkit and these guidelines, then one can only conclude that they do not appreciate how your PR strategy contributes to organisational success. This in turn could imply that the strategy does not contribute to organisational success – or because it hasn't been clearly communicated, or it has been clearly communicated but the recipient still doesn't get it. Whichever, the challenge is then beyond the scope of these guidelines.

What we will say here is that any robust attribution of return on investment to a social media strategy or individual tactic is the exception and not the norm. If you have a relatively placid marketplace, and if you execute one strategy in isolation, and if you can correlate an uplift in sales with the timeline of the strategy, then an estimation of ROI shouldn't be too taxing. But these instances are far from common.

Investment in social media PR is, by definition, an intangible asset, and is no more or less quantifiable than any other intangible asset. What exactly was the ROI on that site-wide Windows upgrade, last year's training and development budget, the office refurbishment, the TV ads and the re-brand? Leading organisations understand how specific investments in intangibles contribute to organisational success because they excel at mapping the

alignment of strategy across the organisation's operations.

Here's another way to look at it. Best practice social media aims to build reputation through conversation and engagement. It aspires to Grunig's 4th model – two-way symmetric public relations. It underpins an organisation's drive to grow relational rather than merely transactional customers and stakeholders, and the customer's or stakeholder's life-time value cannot be attributed to one week, one month or one social media strategy.

If your organisation excels at strategy mapping and building customer / stakeholder relationships, approaching the measurement of social media according to these guidelines should be a slam dunk even LeBron James would be proud of.

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AMEC's "PR Measurement Metrics: From Concept to Implementation Reality" proceedings, including the "valid metrics" and social media guidelines: http://www.londonmeasurementconference.org/downloads.html

Institute for PR Measurement Commission's "social hub" with commentary and background on the Barcelona Principles, "valid metrics" approach and related measurement discussion: http://www.iprmeasure.org/

More resources are maintained at: http://ciprsm.wikispaces.com/Social+measurement+resources

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