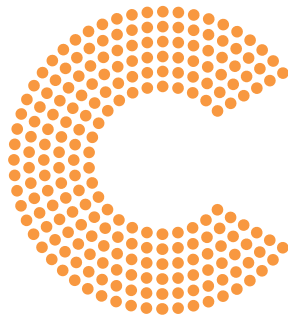




GETTING STARTED WITH MEDIA MONITORING AND MEASUREMENT



CARMA

We Deliver What Matters

CARMA is a global provider of integrated media intelligence solutions. We deliver what matters using an unrivalled mix of cutting edge technologies and experienced media measurement and analysis experts. With people on the ground across the various regions, we offer the most comprehensive monitoring service available on all forms of local, regional and international media whether print, broadcast, online or social. All captured media content is reviewed and analysed by a team of researchers and analysts to provide the most relevant and actionable insight enabling communications professionals to make informed business decisions.





Keeping track of media across traditional, social, and online outlets has become increasingly important in our contemporary, content-driven society. Tracking and analyzing media seems like a daunting task, but monitoring and measurement offer opportunities to simplify these efforts.

This eBook, which is largely composed of posts from [MediaBullseye.com](#) and [TheMeasurementStandard.com](#), strives to provide new and experienced users alike with a step-by-step guide to understanding the background, usefulness, and steps necessary to create quality monitoring and measurement programs.

Lack of understanding and awareness are some of the biggest challenges facing monitoring and measurement, so this eBook endeavors to define and provide a clearer understanding of the opportunities available with a well-developed program. The posts are mined from the best content from the two websites cited above, in addition to some additional content created solely for this eBook, with the intention of giving readers a thorough definition and background for the capabilities of monitoring and measurement programs.

As monitoring and measurement software evolves, it provides users with expanded and enhanced options for tracking and analyzing media. From the first stages of outlining a plan and a budget to customizing the program based on your needs, this eBook provides a comprehensive collection of information to clarify the processes of monitoring, measuring, and analyzing media.

07



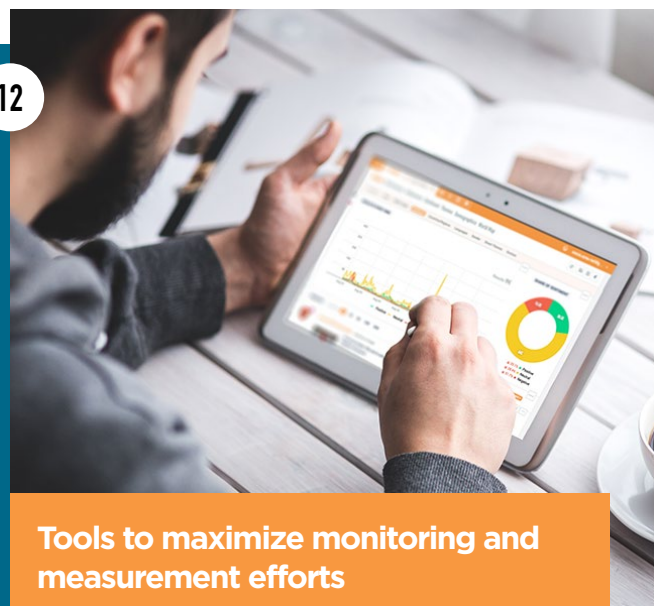
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CHAPTER 1



WHAT IS MEDIA MONITORING AND HOW DO YOU USE IT

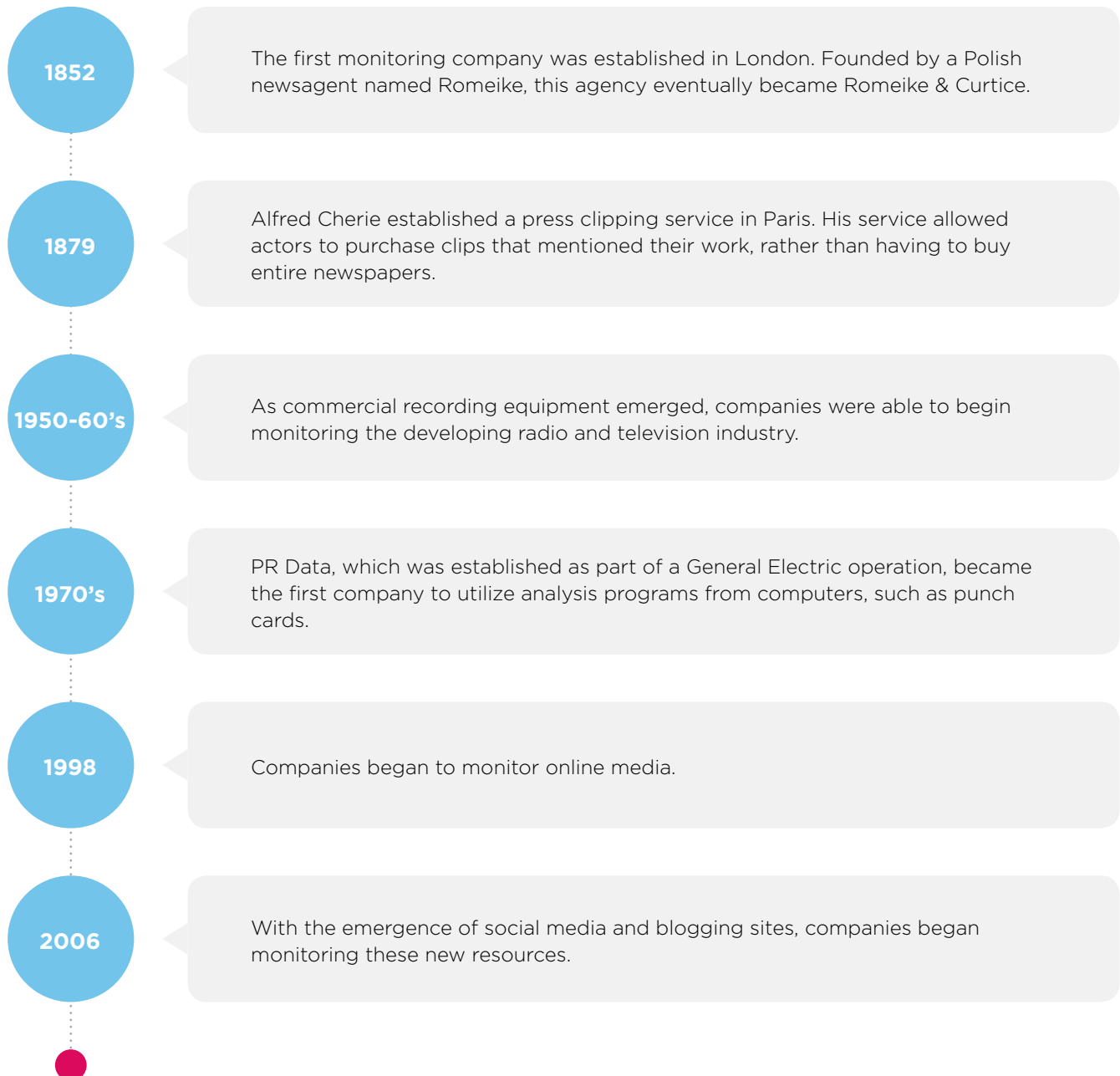
Monitoring, the practice of tracking traditional, digital, and social media, has a long history. Despite the changes monitoring has undergone throughout the rise of the digital age, it remains a vital and necessary resource to gain insight about your company or organization.

Monitoring: a history of tracking media

By Jordan Gosselin

Monitoring has a long history that dates back to the 1800's. Before it was referred to as monitoring, it was called a clipping service or press clipping service, as the industry revolved around extracting and compiling clips from print news sources. With the advent of new technology that emerged in the last century, clipping services evolved into full-service media monitoring and analysis companies that provide important insights for their clients.

For a brief history of the evolution of the industry, see the timeline below:



What is monitoring?

By Jordan Gosselin

The above timeline provides a brief overview of the way the field has developed from its origins into the highly comprehensive, technical process that exists today. Since media monitoring has evolved so much, it is important to understand the steps of the process.

Monitoring software and human analysts compile search lists of publications and media outlets to monitor. Users create keywords and specific search parameters, and the program pulls results that match the users' conditions from the monitored search lists. Software filters through social, online, and traditional media channels to gather posts and information.

Although online and social media tends to be a large focal point of modern monitoring efforts, companies continue to provide monitoring services for traditional media outlets, such as radio, television, and print resources. The results from the digital and traditional media outlets get compiled and archived for reference by users.

The gathered clips possess virtually no value, however, unless they undergo analysis to reveal trends, sentiment, and insights. The analysis of the compiled clips marks the intersection between monitoring and measurement. Measurement involves analyzing and evaluating media and PR efforts to understand effectiveness and trends. Monitoring software has measurement features that synthesizes information and inputs it into charts and reports. Measurement of compiled data allows users to gain intelligence about their brand, competitors, and performance within their industry.

For example, if a company introduces a new style of shoes, they can use media monitoring to track the launch of their product. They may create keywords such as their company name and the name of the shoes, among several others. The

monitoring software will subsequently search various channels for mentions of these keywords and will compile the results.



The gathered clips possess virtually no value, however, unless they undergo analysis to reveal trends, sentiment, and insights.

The next step for the shoe company involves analyzing these results via measurement to understand the impression of the product. Perhaps the company has noticed lackluster sales of the new shoe. The compiled data allows them to dig deeper into the information to understand the specific issues their customers may have with the product. After analyzing the archived articles and social posts via measurement tools, the company may notice persistently negative reviews about a specific aspect of the shoe. The insights provided by monitoring and measurement allow the company to address the issue, which helps the brand recover and improve.

The above example illustrates the actionable insights that monitoring and measurement can provide. Rather than struggling to understand its performance, a company can utilize monitoring programs to gather information and measurement to analyze trends and impressions from their audience.

Getting started with monitoring

By Jennifer Zingsheim Phillips

Facing the challenge of managing hundreds of news clips can be daunting. For some PR practitioners, it's a regular, daily challenge. For others, there are periods of prolonged increased coverage that need to be handled—like a merger announcement or a protracted crisis—that could mean days, weeks, or even months of irregularly high media volume.

Whatever the situation is, you need a plan to address the volume head-on. Here are some steps to follow and things to keep in mind:

First, know your media monitoring tool.

Familiarize yourself with its functions—particularly the ability to sort the content in different ways. The ability to prioritize the review of content based on things like source name, relevance, or geographic designation will make your processing that much easier. If you have a specific keyword that is of prime importance—like maybe your CEO's name, or the name of a flagship product—make sure there's a way to quickly get at that content.

mental—of your “problem child” keywords and examine the content that comes in from them independently, when you have time to really pay attention and study it. You might find that there are patterns to the relevant content that you can use in your review process to quickly find the gold nuggets amongst the iron pyrite.

Have a game plan. Routines and plans are important when you are working with high volumes because you don't want to miss something significant—but, you don't want to waste time reviewing things that aren't a priority. If you need to review all company mentions, but only need to see the top sources that mention what your competitors are up to, build that into your process.

Sort and skim whenever possible. The ability to group syndicated pieces can save a lot of time, as does the ability to sort by headline. If you have a specific category of publications that are a priority, see if your monitoring tool supports setting up a search or report that separates that content from the overall clip totals so you can review that first. For example, if your company has a nationally distributed product, you'll want to see all mentions. But, you might also want to pay close attention to media in the states in which you have plants. So see if your system can set up a search that will separate out all of the mentions in those specific states—then, you can review that content first before reviewing the general coverage.

if you're spending a lot of time sifting through irrelevant content, it's probably time for you to revisit your keywords and see if there's a better way to find what you are looking for in your clips

Craft your keywords carefully. This almost goes without saying, but if you're spending a lot of time sifting through irrelevant content, it's probably time for you to revisit your keywords and see if there's a better way to find what you are looking for in your clips. If you *have* to keep all of your keywords, make a list—physical or

The most important thing you can do is have a good, solid understanding of your monitoring tool's capabilities. Set up the processes, have a plan to attack the content, and pretty soon facing hundreds of clips will feel like no big deal.

A version of this [post](#) originally appeared on [MediaBullseye.com](#)

CHAPTER 2



THE BENEFITS AND USES OF MONITORING

Now that a comprehensive definition and background for monitoring has been outlined, it is important to understand how monitoring programs work. The following sections outline specific uses and benefits professionals gain from subscriptions to monitoring programs.

Using media monitoring to combat information overload

By Chip Griffin

It seems as if every day brings new information sources. Public relations professionals regularly lament the lack of time available to consume all of the good content out there — or even to identify what's worth reading.

A good media monitoring program can help. Rather than hopping from site to site to access a random firehose of information, effective media monitoring allows you to tailor your results to just the content that's most likely to be of immediate interest.

Here are some things that you should focus on when setting up a media monitoring feed to combat information overload:

- **Zero in on the most relevant topics.** Use your search terms to uncover articles about your organization, leaders, competitors, and industry. Think about what's a "can't miss" story and refine your keywords to hone in on these pieces.
- **Configure alerts for the most important stories.** Don't wait to see mentions of your CEO until you login to your account. By creating email notifications for urgent stories like these, you can stay a step ahead of the game.
- **Be realistic about what's "urgent."** It can be tempting to act like every story is a priority. That's not the case. You need to have clear criteria to separate the wheat from the chaff in order to maximize your time benefit.
- **Create different buckets of search terms.** Sort out your media monitoring keywords so that have a group that you must look at every day, along with the nice-to-haves and a broader bucket for days when you have more time to peruse potentially interesting content.
- **Share your results among the full team.** Too often teams reinvent the wheel by having everyone looking at the same set of sources

or the same raw media monitoring results. By creating formal executive news briefings or informal lists of links to share with your team, you'll all save time.



Unlike AVEs, properly executed monitoring and measurement plans provide reliable data and actionable insights.

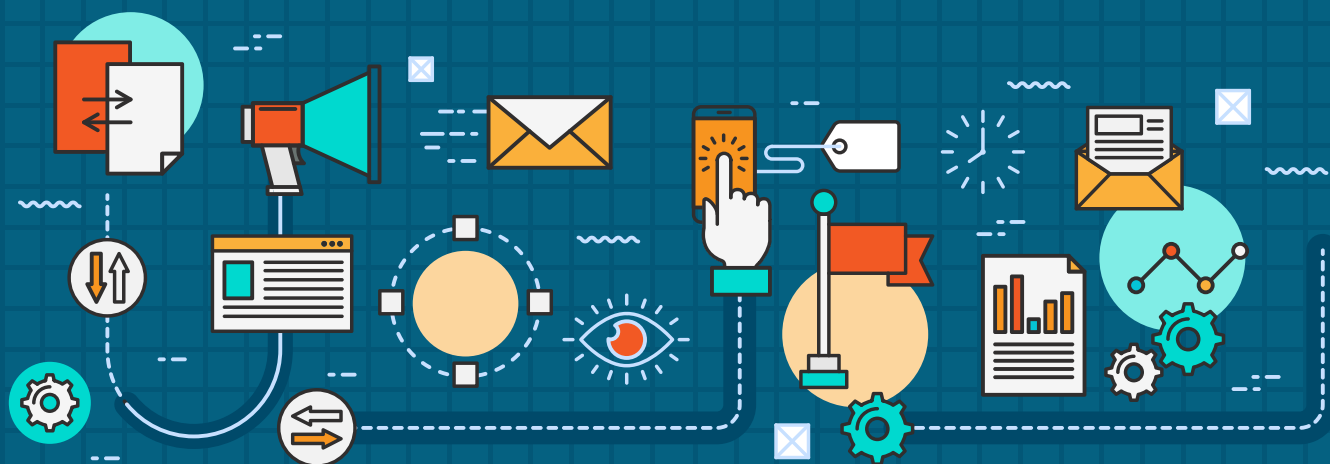
- **Ignore simple mentions.** If you're looking to reduce your time commitment, use your media monitoring platform to skip over stories that just mention your search term in passing. You want to allocate your time to the stories that have greater keyword density and thus are more likely to be truly relevant.
- **Utilize advanced search criteria.** Take advantage of the ability to limit searches by requiring multiple keywords to appear, looking at capitalization, and using words to exclude certain stories.
- **Focus on certain publications.** Use your search criteria or reports to identify stories in targeted publications that matter most to you. These can go into your "can't miss" bucket.
- **Leverage geography and language.** Don't speak Dutch? Then don't bother looking at those articles. Is your target market limited to certain states or countries? Limit your searches to those areas.

A version of this [post](#) originally appeared on [MediaBullseye.com](#)

The following subsections outline specific benefits of quality strategies.

Tools to maximize monitoring efforts

By Jordan Gosselin



Whether you're a novice looking to delve into monitoring and measurement or a pro looking to amplify your efforts, tools exist to assist. In particular, AMEC's Integrated Evaluation Framework, as mentioned in Chapter Three, Section Two, provides a comprehensive resource to plan efforts.

This tool premiered in June 2016 and has been hailed as a pioneering resource in the PR measurement and monitoring fields. Previously, these fields lacked specific industry standards, but the framework is now available as a free online tool that allows users from any industry to layout and plan their strategies.

The tool is comprised of seven tiles, objectives, inputs, activity, outputs, out-takes, outcomes, and impact, that requests users to enter information. The information provided gets digested by the tool, which then guides users to suitable plans.

The Framework is particularly helpful because it builds on the Barcelona Principles, another useful guideline in the PR measurement field. The Barcelona Principles consist of a list of best practices, such as the fundamental value of measurement to communication and PR and

the importance of measuring social media with other channels. Basing the Framework on these Principles allows users to build a plan that is grounded in proven standards.



The tool is a useful, easy resource that seamlessly guides professionals to best practices in measurement and monitoring.

Although the Framework and Principles possess great value, it does not assume all the responsibility of creating a plan; users still must research, plan, and answer questions. The Framework does, however, work simultaneously as an interactive tool and an educational resource. It functions as a platform to guide through the measurement and evaluation process, as well as an instructional manual for the qualities a plan should contain. The tool is a useful, easy resource that seamlessly guides professionals to best practices in measurement and monitoring.

Using media monitoring to develop media lists

By Jennifer Zingsheim Phillips

One of the most underappreciated uses for monitoring is how it can facilitate the creation of media lists.

Previously in the PR industry, there were two ways you generally tackled pulling together a media list for a client. Either you were handed an existing media list that would need to be manually verified and updated—and this meant calling phone numbers on the list and verifying the reporter still worked at the publication and on that beat, and then verifying the fax number—or, you pulled together one from scratch. Needless to say, this was one of the least glamorous aspects of PR, it took hours, and there were appropriate specialty publications that would get missed.

There is a (much) easier way.

The key elements of an effective media list are: relevant publications, the reporter/blogger name, and an email address. A phone number and a Twitter handle, when possible, are nice additions to that list.

The most useful functions in a media monitoring tool will be the sort and create spreadsheet functions. The first step recommended is to pull all coverage your client account has received over the last three or six months—or over the last year if it's a lower volume account.

Then, sort the information by publication. Within publications, you are looking for a few things: one, any publications that repeatedly mention your client or client issues/topics; two, any major publications that mentioned your client; three, any specialty publications that target your client's business niche; and four, an "oddball" category. The "oddball" category could contain things like coverage in an unexpected place, or mentions that don't fit a standard profile for business objectives (such as if the CEO was featured in a car enthusiast magazine because of a car collection, etc.); it's a catchall category that may or may not yield useful targets. Within

these categories, tag any that should be on a media list. Be discerning with this; relevance is important.



The benefits of creating a media list from content pulled together from your existing media monitoring work is that it is basically “prequalified” information.

The next step, if you've been tracking sentiment, is to sift through the publications results making note of sentiment. Tag or note the positive pieces and neutral pieces. Examine some of the negative results and see how the clip earned that rating. There's a difference between a clip rated negative because of the way an issue was handled in the piece versus a journalist who has your industry in his or her crosshairs. Tag the ones that should be on a media outreach list.

Now, create a spreadsheet using the tag you've created as the filter, and include whatever fields are useful to you. From there, it's simple to add columns to the spreadsheet for items like email addresses—which are usually just a click away on the source's page—and any other information that you deem necessary.

The benefits of creating a media list from content pulled together from your existing media monitoring work is that it is basically “prequalified” information. These publications have already written something that was relevant to your company or client, so the interest exists. Your role is to look at what it is that you will be pitching and make sure it's a logical fit with those you've targeted in your media list.

A version of this [post](#) originally appeared on [MediaBullseye.com](#)

Capitalize on monitoring efforts by avoiding time traps

By Jennifer Zingsheim Phillips

The use of monitoring tools makes the formerly arduous process of finding clips, reviewing, and then categorizing them a much simpler process. That doesn't mean that there aren't time traps lurking. When you are aware of these time sinks, you can more easily manage them.

Here are some of the top media monitoring time traps and how to avoid getting caught in them:

1. **Spending too much time wading through content.** This is a very easy one to fall into on a daily basis, and can turn your monitoring into a considerable effort instead of an item that can be checked-off on a to-do list within a reasonable frame of time. The biggest culprits here generally are either overly broad keywords that bring in too much content; a lack of filtering content into easily digestible batches; or, possibly, a “fear of missing something” that leads to closer review than may be warranted. To combat this time trap, make sure your keywords are well designed, and make sure you have good filters set up. Well-considered filters can actually combat the “fear of missing something” too—it is much easier to miss something important when wading through 500 clips rather than looking at five sets of 100 clips in five different category areas.
2. **Following crumb trails of links.** This is the bane of anyone whose work mandates using the Internet. You read a relevant story, and see a link or reference to another publication on the topic that you are monitoring for, you follow the link (just in case it's relevant), and three hours later it's lunchtime and you still have another 50 clips to review. This is a tough one to address because sometimes those related stories ARE relevant and useful, and might have used slightly different keywords—which means they may or may not have been captured in your monitoring tool. The way to handle this particular issue depends on time. If you are short on time, do a very quick review of just one link away from the source and see if it's relevant—if it is, add it and move on, but leave a window with the clip open so you will remember to go back when there is time to see if
- there's more there to consider, like adding new keywords. If you have the time, do the review/consideration on the spot.
3. **Focusing too much on “in the weeds” items.** This tends to happen in accounts that cover detailed or very specific industries. Usually when you are doing a monitoring review, you're reviewing so that you are generally informed. When an account has a lot of interesting detail or complex information, it can be very easy to slip from “review” to “learning,” which means close reading when you most likely should be skimming.
4. **Getting lost in too many “big picture” items.** The opposite of “in the weeds” accounts, this tends to happen in accounts that are more general. The problem with “big picture” accounts is that a lot of things can fit into a “big picture”—so make sure that you're only reviewing what you need to.
5. **Losing sight of monitoring objectives.** This time trap can be very easy to slip into if you aren't careful. Because a single news story can touch on several related industries or themes, articles may seem relevant even if they don't exactly match the monitoring objectives. Again, filters can help with this time trap by keeping articles in relevant topic areas.
6. **Second-guessing ratings, tags, etc.** This can absolutely pull you down a rabbit hole—try hard not to do this. There can be a bit of bias that creeps into review if you're rating content on tone, because it can be very subjective. After a while you may start second-guessing the tone rating you applied to earlier articles—but, if you change the standard you have to go back and re-rate items you've already reviewed. While this might, on occasion, be necessary, generally trust your initial instincts.

By being aware of the time traps that can exist in media monitoring, you should be able to map out a strategy to avoid losing valuable time in your day by reviewing smartly—and quickly.

A version of this [post](#) originally appeared on [MediaBullseye.com](#)

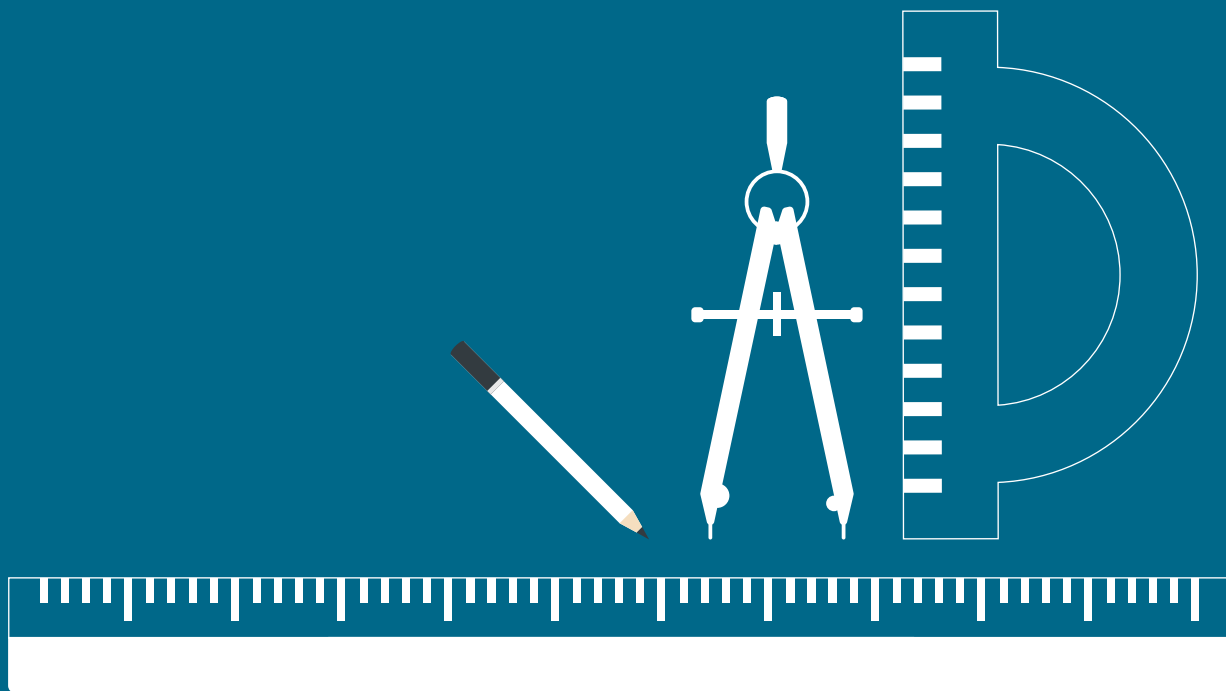
**Using media
monitoring to combat
information overload**

**Tools to maximize
monitoring efforts**

**Using media
monitoring to develop
media lists**

**Capitalize on
monitoring efforts by
avoiding time traps**

CHAPTER 3



HOW TO'S AND TIPS FOR MEASUREMENT

As mentioned in Chapter One, monitoring and measurement often go hand-in-hand. Monitoring programs provide the basis for creating quality measurement. Measurement involves analyzing and evaluating clips compiled with monitoring programs, as well as a variety of other media and PR efforts, to gain an understanding about trends and performance. The sections in this chapter define measurement and provide advice on how to accurately integrate it to your business functions.

Getting started with measurement

By Jennifer Zingsheim Phillips

1. **Sit down with other members of your company to discuss what the expectations are for PR efforts.** Take some time after that to map out and make sure that PR efforts are tied to stated business objectives. For example, if a primary business objective is to sell 15 percent more widgets this year than the company did last year, and a secondary business objective is to enhance the organization's image in corporate social responsibility, PR efforts should be measured back to those goals.
2. **Figure out how you are going to approach your data to get to the information you need.** General mentions in a mountain of clips won't show how PR efforts fed the sales funnel. Setting up Google Analytics to track different efforts can. When considering the CSR enhancement goal, you'll likely be looking for specific keyword mentions in articles, and you'll need to be able to rate that content in order to track improvement over time.
3. **Make a list of any publications or sources that are a "must have" to monitor.** This is particularly important if you are in a specialized field, since general media mentions in mainstream publications will probably be neither as frequent nor as important as a mention in a trade publication, for instance.
4. **Conduct a baseline analysis of where you are right now with respect to the business goals covered in item 1 above.** You should also do a baseline of your top competitors in the industry or field for comparison. A baseline analysis will also help to give some shape and ideas to the next step—choosing the right measurement tool or tools to help you accomplish your goals.
5. **Next, keeping in mind your data approach, what the business objectives are, and what you learned during your baseline analysis, take a look at what measurement tools are available.** Flashy dashboards and pretty charts are fine, but take time to learn about the data behind them. Investing in a measurement dashboard because it has a lot of visuals is one of those things that can lead to "it seemed like a good idea at the time" statements if you aren't able to access the data behind the charts or use the data to generate reports that are better suited to your business than the pre-loaded ones that came with the software. This is important to your overall measurement success.
6. **Set a measurement schedule for reporting.** Are you interested in daily, weekly, monthly, and quarterly reports? Or will a less-frequent analysis schedule suffice? Your most valuable insights will be gained over time so make sure you're examining your data regularly.



General mentions in a mountain of clips won't show how PR efforts fed the sales funnel.

Once you've followed these steps, you're ready to put your program into action. The planning stages take a lot of time but are incredibly important to a measurement program's success.

A version of this [post](#) originally appeared on [MediaBullseye.com](#)

Budgeting for measurement

By Jennifer Zingsheim Phillips

Measuring what works (and what doesn't work) helps you to plan better, reach business goals more quickly, and have a PR program that performs better all around, but the costs can begin to add up. From dedicating internal resources to purchasing monitoring platforms, good measurement does require a budget. Even if the return on those investments is positive, the initial outlays can seem daunting if they haven't been well-planned.

There are ways to address and manage the cost issue. What is important is that you are measuring the right things at the outset, so you can show results. Concrete, actionable results do more to convince the powers that be that good measurement is worth the investment than any amount of pitches or blog posts ever could.

Here are some suggestions for addressing the cost challenges of setting up a PR measurement program:

Don't over-promise or reach for the moon – be realistic when setting up measurement

Setting up a measurement program for the first time can be daunting. A tool that can help in this regard is the [AMEC Interactive Framework](#). Clicking on the “information” button on each framework box can give you an idea of what you can measure, and how you should organize your efforts.

In addition to providing ideas on what can and should be measured, the framework is a good planning tool. Focus on what measurement goals are realistic if you're just starting out, making sure they fit with business objectives.

There are some items that might be an issue if you're measuring on a budget. For instance, the “out-takes” and “outcomes” boxes both include survey information to assess the effectiveness of PR program elements. Surveys can be expensive to conduct, so make sure you think this aspect through—how you will pay for surveys and what kind of surveys would be used—before finalizing your measurement program.

Set up measurement that can grow with you, so you can add more elements later if needed

One of the most effective ways to keep measurement costs down is to use free or low-cost measurement tools and programs, like Google Analytics and Excel for your calculations and analysis. Budget-smart decisions like this can work very well, and are a great interim solution as a measurement program grows.

Assessing tone and sentiment manually, rather than paying for automated sentiment if it is an add-on cost to your monitoring, is another way to reduce costs. Keep track of how you rate content, so that if and when you do add automated sentiment, the integrity of your data is maintained.

Budget (or at least plan) for worst-case scenarios

Hidden budget busters usually come in the form of unanticipated costs. In the case of measurement, that can mean large data spikes, especially if something good (front page of the New York Times!) or bad (crisis) happens. If something like that happens and you're manually assessing each item for message content or rating, you'll need to address it somehow. You don't necessarily need to build it into the budget, but at least spend some time thinking about how you would address unexpected challenges in your measurement program.

Figuring out early what you need to measure to meet goals, and separating the “nice to haves” that are perhaps cool but not necessary will help you to keep your focus. Budget constraints might limit how much you can tackle early on, but as you build a program that shows results, you'll be in a better position to advocate for budgeting for more down the road.

A version of this [post](#) originally appeared on [MediaBullseye.com](#)

Why won't AVEs go away?

By Bill Paarlberg

Measurement experts and organizations have been arguing for [at least a decade](#) that AVEs are not a proper way to evaluate the effectiveness of PR. Five years ago the Barcelona Principles codified that advice into a fundamental truth of the communications measurement and evaluation profession.

So then, why, in the face of the strongest arguments our profession can muster, do people refuse to listen, or understand, or heed our advice? Why do AVEs continue to be recommended, argued for, promoted, and used?

Well, it's complicated. But part of the answer lies in something bigger than just AVEs: What if some PR people just don't think proper measurement is as important as we do?

The AVE argument impasse

There are a whole host of reasons why AVEs are bad measurement (start with [Katie Paine](#), [Richard Bagnall](#), and the late [Don Bartholomew](#)). And there have been many reasons put forth as to why they are so seductive, so appealing, so, well, "useful" (start with [AVEs Are Porn for PR](#)).

But there remains a puzzling disconnect: On the one hand measurement pundits and professional organizations keep yelling their objections, and on the other hand voices keep popping up who seem to continue to find AVE valuable (see [Rob Wynne](#) and [Nick Brooks](#)).

So then why do people keep arguing for AVEs?

Lots of reasons have been put forth as to why AVEs keep being used. It's clear, for example, that "measurement" companies continue to profit by their sale. It's also clear that some business people continue to prefer the pseudo numbers of AVEs to no numbers at all. Or to the real numbers that are harder to come by.

But there is a difference between AVEs being used and AVEs being actively promoted by people who seem otherwise intelligent and informed. Take [Mr. Wynne](#) and [Mr. Brooks](#), for instance. Why aren't they heeding the best advice of the measurement profession?

We can find a clue by looking closely at their recent writings. They seem to be aware neither of practical alternatives to AVEs, nor of the outputs/outputs/outcomes framework of thinking about evaluating PR. It's as if they exist in a world apart from contemporary PR measurement best practices. As if some huge gap exists between how they think about measurement and the advice of the experts.

Perhaps it's not just an AVE problem, but a knowledge-and-interest problem

Is this due to lack of education? No doubt that's part of it. But the basic problem may also be a lack of caring about measurement. For us in the industry, measurement is of paramount importance. But what about for the rank-and-file PR person?

For us experts, AVEs are anathema. But for much of our audience, you could almost understand that, for a PR person who has never had to think about measurement, AVEs might seem like a good idea.

Is it possible that there is a significant fraction of our audience that, as yet, just has not had to care that much about proper measurement and evaluation?



They seem to be aware neither of practical alternatives to AVEs, nor of the outputs/outputs/outcomes framework of thinking about evaluating PR.

Wait. Really? There are PR people indifferent to measurement?

Indifference or ignorance? Recall [this PR Week article](#) on measurement theory that displayed a remarkable ignorance of the Barcelona Principles and basic measurement terminology. Note especially the reader



I was at the AMEC summit in June 2014 in Amsterdam and I have read a lot of AMEC's material since then and let me tell you: it may not be the exact wording of the principles from 2010, but everyone talks like the goal and the spirit of the principles is to get the industry to adopt a new, universal standard.

That is, according to this guy, everybody is mistaken about the Barcelona Principles.

The point here is that it appears likely that the general PR populace is not very well informed about the basics of measurement and evaluation. Are we expecting too much of them?

The reason why AVEs won't go away is probably much bigger than just AVEs. It's about the general interests, knowledge, and needs of PR people. Perhaps they're just not into measurement like we are. Or not yet, anyway.

A version of this [post](#) originally appeared on [TheMeasurementStandard.com](#)

Set measurable goals

By Jennifer Zingsheim Phillips

To ensure measurement is being properly utilized, there is a need to establish benchmarks and set goals. Here are a few tips to get you started on identifying what needs to be benchmarked, and how to set goals that will be measureable and attainable.

What can you measure?

- **Sentiment and tone** – Establishing a benchmark can help you see how attitudes toward your brand or company change over time.
- **Volume and number of mentions** – Tracking volume is particularly helpful if you are launching a new brand, product, or other new-to-market item. Overall generic volume is less helpful to measure. One exception to this is in a crisis—in that instance it is very useful to see when crisis mentions drop either due to PR efforts, or when the crisis is over.
- **Topic mentions** – This could also be called “message mentions” or “product differentiation mentions.” Tracking specific messaging in conjunction with a brand name helps to demonstrate how and where your brand or product’s key attribute mentions are taking hold.
- **Share of voice** – SOV should only be tracked in conjunction with sentiment or tone. For example, BP might have garnered an enormous amount of the SOV of oil

companies during the Deepwater Horizon disaster, but it is unlikely anyone would approach a client suggesting a big PR blitz to match that SOV. Devoid of context, SOV can lead you in some wrong directions in PR.

Setting up a baseline

For any of the items above, you’ll need to pick an amount of time to view for the baseline. If you are already tracking these items, identifying your baseline should be fairly straightforward.

- If you’ve already been tracking for a year, six months, or a quarter for sentiment, you’ll want to identify any segments of time that should be excluded from the baseline.
- This means, for example, removing periods of overly positive coverage and overly negative coverage. If your client made a large donation to a hospital and had weeks of positive coverage, you’ll want to exclude that from your calculations.
- Do the same with any horrible coverage, like the BP example above.
- Why? Because these bouts of intense ups and downs will make your baseline less accurate. If you leave in all of that positive coverage, your baseline will be artificially high and setting goals based on that (say, to improve positive mentions by 10 percent by the end of first quarter) will be inflated and hard to reach. Conversely, leaving a slew of negative mentions in will make it easier to reach an “improvement” goal, but it won’t reflect reality.
- Examine what remains after removing extremes, and find the average percentage of sentiment for positive, neutral, and negative mentions. That is your baseline.
- Repeat the process for volume, mentions, and SOV/with tone.
- If you are not already tracking these items, you’ll need to collect data in order to establish a baseline.

Tracking specific messaging in conjunction with a brand name helps to demonstrate how and where your brand or product’s key attribute mentions are taking hold.



- Determine how much time you are willing to dedicate to monitoring simply to establish a baseline (a week, a month, or a quarter);
- Gather the data;
- And then perform the analysis above. Remember that the more data you have, the more accurate your baseline will be.

Once you have your baselines established, you can move forward on setting goals for improvement that correctly map to your measurement program.

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Establish a measurement calendar to best utilize time

By Jennifer Zingsheim Phillips

Establishing a measurement calendar is one solid approach to getting the most out of measuring metrics. A measurement calendar is no more than setting up clear dates or time periods to run interim analyses. Practically all programs are set up to conduct measurement at the end, to show program successes. However, if you're engaging in long-term monitoring, or doing PR for a major brand outside of a set program (such as a new product launch or other campaigns with set beginnings and ends), there really is no "end date" to target after which you would do analysis. In either case—set campaigns or ongoing programs—you should consider setting up a measurement calendar.

Setting up a measurement calendar

- To set up a measurement calendar for an ongoing project, first take a look at what you are measuring that maps back to business objectives.
- If you're tracking sentiment to view how brand perception is being received, you'll probably want a fairly frequent assessment of where things stand.
- Determine your baseline, and then see how sentiment is tracking relative to that baseline on a bi-weekly basis. By setting up a calendar to track this on a regular and somewhat frequent basis, you'll be able to plug in external markers that might affect your numbers.

For example, if a competitor launches an ad campaign that critiques or mentions your brand by name, you should plug that into your bi-weekly analysis at the time you learn of it. These are the types of things that might be overlooked if you check data infrequently—you'll see dips in sentiment and then have to go back and dig into the coverage to see why. Establishing an ongoing calendar saves time by requiring a more frequent look at the data and making notations when they occur rather than going back through when the information isn't as fresh in your mind.

While the example above is about tracking, it works for other measurement items such as: number of subscribers, downloads, and other metrics that support goals. Other ideas for measurement calendar tracking dates are:

- Monthly assessments
- Quarterly analysis
- Matching a calendar to key corporate dates, such as board meetings
- Other internal benchmarking dates
- Annual assessments

There will be times when it might make sense to add additional dates to an established measurement calendar. During and in the weeks or months following a crisis, it might make sense to dive into the data a bit more frequently—even though it might feel like the worst possible time to add more to your plate.

Establishing a measurement calendar is helpful in that it standardizes your measurement activities and helps to keep goals top of mind. It can also allow you to track progress, compare data month-over-month and year-over-year, and can provide good data on which to base course corrections if they are needed.

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EXAMPLES OF SUCCESSFUL MEASUREMENT AND MONITORING

A sampling of how to implement and use plans in various industries illustrates the value of media monitoring and measurement. Industries use monitoring and measurement plans in different capacities, and the following sections outline how different industries utilize and benefit from the processes.

Improving ROI of public relations with measurement

By Jennifer Zingsheim Phillips

Calculating the return on investment—ROI—of public relations activity is a notoriously difficult process. Ultimately, the objective of PR is to win hearts and minds. How do you measure that?

The Public Relations Society of America (PRSA) crowdsourced its [definition of PR](#), and came up with:

“Public relations is a strategic communication process that builds mutually beneficial relationships between organizations and their publics.”

This is probably the best place to start in an attempt to break down what can be used as a standard to both establish a baseline and therefore measured to get to ROI. The phrase “communication process” is important, because established processes can generally be measured. PR efforts are often tricky to measure quantitatively. There is of course value in positive brand or company perception, but assessing a number—to be precise, a dollar figure—that directly maps back exclusively to PR activity can present a challenge.

Here’s how to do it

1. It’s said often, but step one is to tie PR goals to the KPIs of the organization.
2. Always establish a baseline for whatever you are measuring. You need to know where you are starting from if you’re going to be looking at numbers.
3. Define your target audiences, and identify all of the channels through which they can best be reached, whether it’s traditional media, social channels, grassroots outreach, or all of the above.
4. Determine your measurement process—this could mean using measurement tools, like a monitoring platform, or, it could mean deploying things like user/audience surveys.
5. Determine your timeline(s). If you’re running a fixed-length program that will go on for six

months, you know your start and end times, and you’ll probably want monthly or halfway measurement markers too. If your timeframe is ongoing, determine useful intervals to measure.

6. Determine what outcomes or consumer behavior you’ll be measuring.
7. Give your measurement programs enough time to collect data before you start adjusting your processes too heavily.

How will collecting and measuring this data improve ROI?

As you are measuring these elements, patterns will emerge. You’ll be able to see what is working and what isn’t. Moving resources to what is working will improve results—this could mean anything from shifting resources to social media outreach programs that work from efforts that did not, or it could mean allocating additional dollars to improve results.

Establishing a measurement and monitoring program will directly impact your ability to demonstrate the effectiveness of PR—and it will also likely show where inefficiencies exist in your programs. By discovering and correcting these inefficiencies, you’ll be able to spend more time on the strategies, tactics, and programs that work.



There is of course value in positive brand or company perception, but assessing a number—to be precise, a dollar figure—that directly maps back exclusively to PR activity can present a challenge.

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Monitoring and measurement for nonprofits

By Jordan Gosselin

Nonprofits typically, and understandably, have a tight budget. In addition to their tight budget, donors want to ensure that a high percentage of the money gifted to the organization goes towards their cause. Despite the budgetary constraints of nonprofits, creating a quality monitoring and measurement program remains important. With additional manual work, exploration of free resources, and the right program for your organization, monitoring is a possible and useful endeavor.

Most useful practices for nonprofits

1. Monitoring media mentions

Nonprofits require support from the public to maintain funding and support. Monitoring mentions gauges how often and what publications feature information about the nonprofit and their cause. This monitoring activity can show users whether or not their organization is succeeding in generating attention. This information allows organizations to change their approaches to achieve greater success.

2. Analyzing sentiment

Monitoring programs have tools that allow either manual and automated measurement of the emotion and impression of media coverage, which provides an understanding of the perception of an organization and their work. Insight to sentiment permits nonprofit professionals to structure their media materials in response to the public's emotions.

3. Tracking trends

Monitoring programs can measure trends as they take shape on various channels. Nonprofits that track trends can join a social conversation as it progresses and/or find developments in their industry. Identifying trends in online, traditional, or social media can give nonprofits the opportunity to formulate responses that optimizes their participation and visibility within a conversation.

How to achieve these goals-without breaking the budget

In order to maximize the benefits available with media monitoring and measurement, nonprofits must creatively plan their budget using a combination of free tools, customized plans, and manual involvement.

1. Free tools

Although free tools aren't always the best solution, they can serve as good substitutes for certain features. Specifically, Google Analytics provides free access to numerous resources that allow users to track and measure online activity.

Goal conversion tracking is a particularly useful feature within Google Analytics. They require a little bit of setup, and perhaps some help from the IT department, but once they are implemented, you can track how often users complete a desired activity, such as subscribing to a newsletter or making an online donation. These features allow nonprofits to discern the digital efforts that are generating the anticipated response and to resolve any issues that are showing concerning data.

2. Customized programs

When it comes to paid plans, it is vital to find the best program for your organization. To make this decision, it's best to assess your organization's greatest needs. For example, you should decide

Identifying trends in online, traditional, or social media can give nonprofits the opportunity to formulate responses that optimizes their participation and visibility within a conversation.



if your monitoring needs to stretch throughout the entire year. If not, look for a monitoring company that offers monthly plans. Rather than paying for a yearly subscription that you don't need, month-to-month subscriptions allow organizations to join and cancel on an as-needed basis. The money saved on month-to-month subscriptions can allot funds for more in-depth features that cost extra.

3. Manual efforts

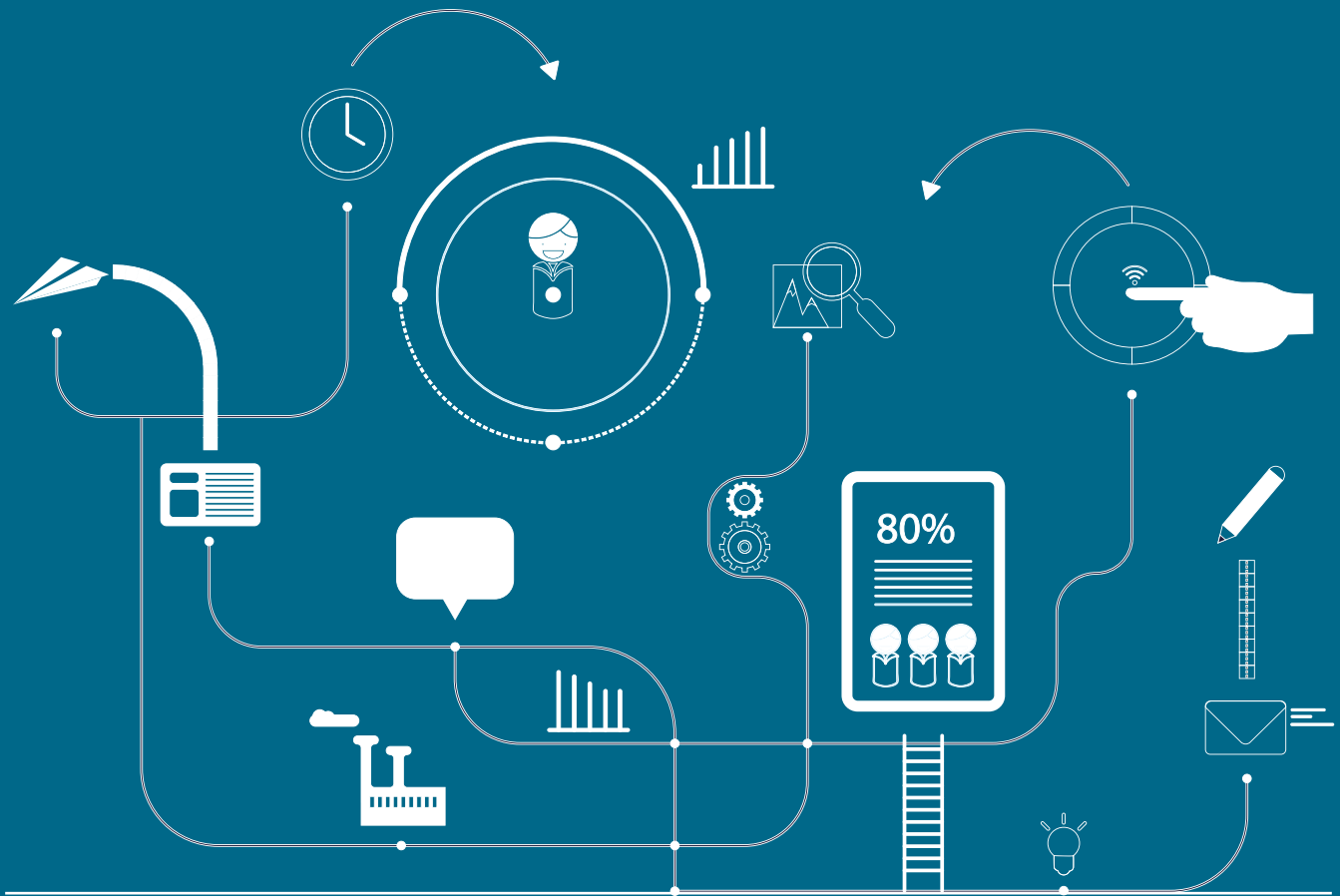
Regardless of whether your organization enrolls in a paid or free program or a combination of the two, it is going to involve more hands-on effort. Companies with bigger budgets have the option to pay analysts to do more in-depth monitoring and measurement for them, but for those with

budgeting constraints, a successful program requires human intervention to achieve desired results.

Creating a schedule can assist in this necessary manual work. Establishing when and how you'll review results and compile data can reduce the likelihood that this work falls to the wayside.

By employing the above strategies, nonprofits can enroll in a monitoring and measurement program that best benefits their organization.

CHAPTER 5



MAKING THE CASE FOR MONITORING AND MEASUREMENT

Making the case to the C-suite

By Jordan Gosselin

Deciding to set up a monitoring and measurement plan is great, but it requires a pivotal step to move forward; you must get approval from the C-suite, who may be skeptical about adding another cost to the budget. There are steps that can be taken, however, to illustrate benefits that may sway your C-suite.

Be prepared with concrete evidence and information

Measurement and monitoring are not one size fits all; users can personalize it to cater to their individual needs. Before making the presentation to the C-suite, professionals should research different monitoring programs to find the best fit for their business. Compiling evidence and showing the C-suite a detailed plan for the best program can provoke a warm response.

1. Do a free trial before presenting to the c-suite

Free trials, which are offered by most media monitoring companies, allow users to gain an understanding of the program's capabilities. Trials permit exploration of the interface, experimentation with its various functions, and a review of the sample reports that programs can make.

A trial allows you to understand the program that will be best for you. If, during the trial period of a program, you realize they are unable to offer certain features, such as customized, branded reports or flexible plans, you will realize that a program is not right for you. Accumulating information about a subscription will give you firm evidence about monitoring's value to your business.

2. Compile sample reports

The sample reports, as mentioned above, possess particular value when convincing

the C-suite to subscribe to a program. These reports exhibit tangible value by showing data about your company's media mentions and performance. For companies that lack a monitoring and measurement plan or do not have a well-developed plan, these reports may provide the first access to quality, insightful data. Showing these to your C-suite will illustrate the data and actionable insights your business can secure from subscribing to a program.

3. Outline the budgetary requirements

Budgeting plays an important role in deciding to engage in any new business venture. Giving the C-suite an estimate of the numbers required to begin a monitoring subscription allows them to decide if the company can and should invest. (For more details on crafting an effective monitoring budget, see Chapter Three, Section Two.)

4. Demonstrate how monitoring and measurement can contribute to business decisions and revenue-generating efforts

The number of likes on a blog post or followers on your social media accounts may seem exciting and important, but they don't necessarily contribute to your business objectives. Focus on the way monitoring programs accumulate data that permits actual responses that benefit your business. Accentuate how monitoring and measurement turn vanity metrics into actionable insights. For example, exhibit how trend tracking of social conversation can help plan future investments of social media campaigns.

Monitoring requires a monetary investment and planning on the frontend, but by illustrating the value, your C-suite will be more likely to agree to a subscription.

Making the case for skeptical clients

By Jennifer Zingsheim Phillips

In addition to receiving approval from the C-suite of your own business, you may encounter problems with convincing clients to enroll in a monitoring subscription. Moving beyond “no” can be a challenge, but it shouldn’t be an insurmountable one.

First and foremost, you have to understand why the client might be resisting measurement. Is it because:

- They already “measure” using AVEs, or counting “Likes”
- The budget is limited and they’d rather spend scarce resources on other activities
- They don’t think measurement is necessary or useful/have never done it

Each reason above comes from a different place, but all three can be addressed by demonstrating the value of measurement by showing the client why it is important.

AVEs and vanity metrics

If a client isn’t interested in expanding measurement beyond Advertising Value Equivalencies or “vanity” metrics like counting followers, it’s probably because they are comfortable with the processes they have in place. There are many, many measurement pros out there who lament the staying power of AVEs. The value of AVEs has been challenged repeatedly and vociferously over the years, and yet...they remain.

Depending on the reasons the client is clinging to AVEs, you’ll probably have to keep generating that number. That doesn’t mean you can’t also incorporate additional metrics—so take a look at what the program goals are, and suggest additional tracking or measuring that makes sense. Bonus points if it isn’t too big a lift or if it uses a free program—and use that data to ease a client into more useful metrics. Google Analytics

is an example of a free program that will provide actual, useful information about what is working and what isn’t.



Budgetary constraints

If a client has budget concerns about implementing any new or different measurement, you’ll need to be creative in showing value without raising costs. This is the toughest one

to move past, because tight budget caps mean that clients have to shift money from what they are doing currently to try something new. That is always going to be a tougher sell than adding on new measurement and comparing, because it carries the risk of disrupting reporting numbers that people have become accustomed to.

To address these concerns, consider proposing measurement that uses programs already in place. If the client is monitoring social media



coverage, suggest tracking changes in attitudes or brand perception. By layering measurement on top of existing programs, you can demonstrate the value of measurement without incurring a new cost and without radically shifting existing reporting.

Have no program in place

This response is probably an exaggeration; almost any organization that is tracking PR coverage and is either conducting PR or has a firm hired to work with most likely has some form of measurement on which they rely, even if it is as rudimentary as counting media clips. The challenge here is to show that there really is value in doing the extra work that measurement requires, because there's likely a bit of the "hey, we haven't needed it so far, so why invest the time/energy/money/effort now?" -thought process involved.

Introducing the PESO (Paid, Earned, Shared, Owned) model and how these components can be tracked and measured effectively is a good way to introduce measurement in a manner that makes sense, is one way to sell measurement to a skeptical client. Another way, if it can be identified, is peer pressure. If a client's competitors have won awards or are participating in public forums about their efforts, relaying that information might be an effective way to demonstrate the value of measurement.



Introducing the PESO (Paid, Earned, Shared, Owned) model and how these components can be tracked and measured effectively is a good way to introduce measurement in a manner that makes sense

Proving that measurement can be effective without busting the budget takes creativity, but is worth it in the long run because you're better able to track what PR efforts are working, and which ones are not.

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GETTING STARTED WITH MEDIA MONITORING AND MEASUREMENT

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