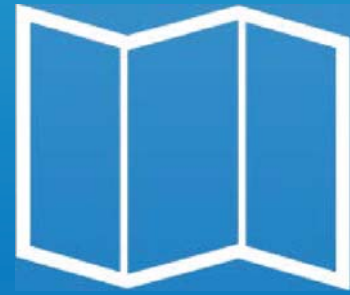




CHAPTER 5

Measuring PR Performance across borders

Antoine Harary



Welcome to the “fix and flex” age of PR measurement: Overcoming the complexity of measurement across multiple markets, and avoiding the perils of overly standardized solutions.

PR executives and marketers have a dream: accurately demonstrating the value their work brings to their organization. The dream involves being able to base their requests for funding, resources, and license to decide and execute on hard, un-challengeable, rational metrics and data.

As the global leader of a consultancy that holds measurement of integrated communications and marketing as one of its core reasons for being, I have an obligation to help our clients reach this ideal.

It starts by listening to their needs. What would expand the impact they can have on their organization's business and performance? What would truly make their job easier?

Each company is unique. Yet it is striking to see that the needs expressed by communication and PR leaders in terms of data and analytics ladder up to four macro questions:

- **How can you help me design and optimize my strategy based on proper insights and data?**
- **How can you help me manage my teams and investment better and smarter?**
- **How can you help me predict and anticipate the impact of my campaigns?**
- **And the most important of all, how can you help me demonstrate the value I bring to my organization?**

All these questions can be answered with the right combination of research, media analytics and data sciences, but there is one overarching element that is needed for the answers to cross borders of markets or business units: a genuine communications measurement framework.

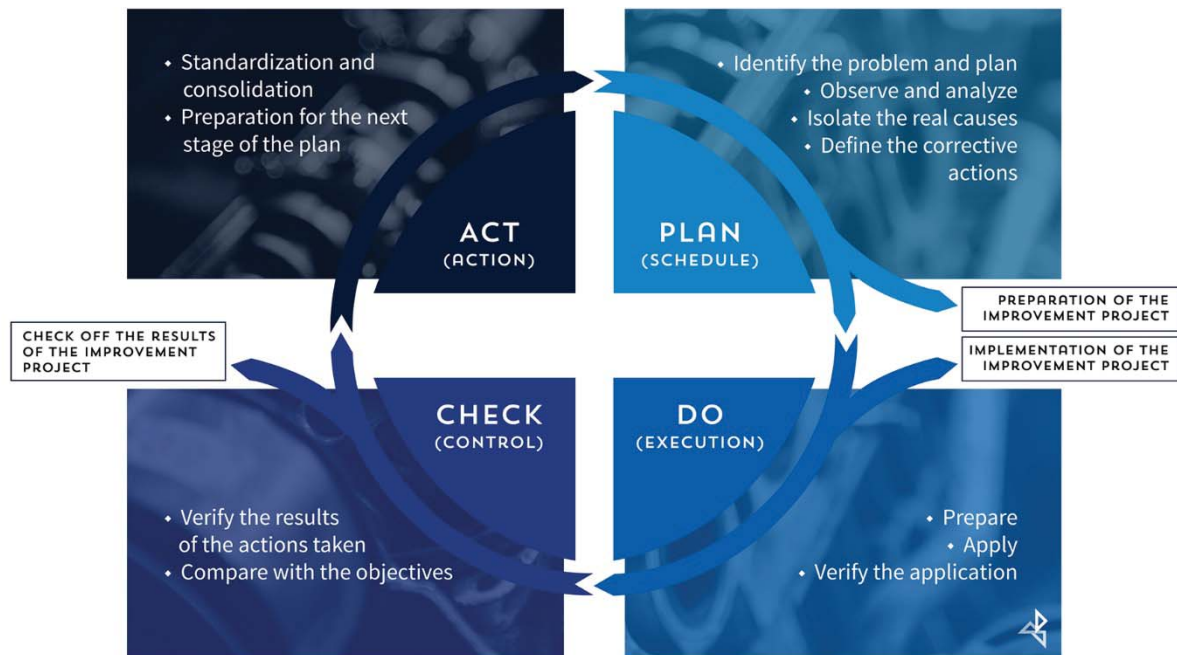
What is a measurement framework? For us, it is a set of research, analytics and reporting protocols, allowing its users to showcase how PR is driving a change. The change must align with the strategic objectives from the organization in a rational, structured and dynamic way.

It is not a collection of measurement tools or initiatives. It is a systematic and conscious articulation of the data a company collects to manage its communication performance; continuously helping leaders allocate their resources, monitor progress, optimize campaigns, demonstrate impact and provide insights to do better the next time.



THE PR PROFESSIONAL'S Definitive Guide to Measurement

It's nothing less than the Communication version of the classic Continuous Improvement or PDCA wheel of Deming, one of the fathers of quality management. Source: Deming, W.E., 1950. Elementary Principles of the Statistical Control of Quality, JUSE]



There are many ways to build this type of framework. Many of them are good, if they are engineered and maintained by qualified professionals. Nonetheless, it is fair to say that very few organizations manage to avoid the pitfalls of the exercise, especially when attempting to build a framework that would operate across borders.

We have developed clear convictions through our consulting for clients operating in a multi-market reality, often doubled in complexity by the multi-brand, multi-business unit nature of their operations.

1/ Don't confuse abundance of data points with the quality of the decision they enable.

Data has never been as cheap to collect, abundant, fast growing and diverse as it is today. The abundance of data is not the problem. Yes, PR measurement frameworks should absolutely synthesize higher and higher volumes of big and smart data, but we must keep it actionable and operational. We need to be able to articulate the right metrics in a way that makes sense, and truly empower decision making.

2/ Don't buy into the tech-only measurement promise: maintain a healthy level of skepticism. Automation and algorithms should augment the human critical thinking that only true expertise can bring.

Automation, technology (and increasingly artificial intelligence and machine learning) offer measurement professionals unprecedented opportunities to collect, compute and interpret data in a way that would have been unthinkable even a couple of years ago. In parallel with the development and democratization of these technologies many agencies and consultancies have developed offerings that offer the promise of a fully automated and technology powered measurement index,



THE PR PROFESSIONAL'S Definitive Guide to Measurement

score, quotient or other mechanism. They claim that they can be adapted to most businesses and organizations willing to evaluate the impact of their communications.

In our experience, this is a dangerous promise. Firstly, because only the human mind can fully interpret the results gathered in how they apply to the context and objectives of a campaign or initiative. Secondly, because the mere idea of summarizing the contribution of a communication plan or campaign with an “off the shelf” score is often naïve. It should have the ability to deal with an incredible diversity of objectives. Finally, with the increasing amount of data we process and the more technology-enabled findings we can gather, the more you actually need human expertise and critical judgement to properly align them with what will genuinely resonate with your business. Automated sentiment analysis is a great example where human expertise is needed to refine, train, validate and deepen the information collected, and turn it into actionable insights.

Technology and artificial intelligence enhances what we do, but cannot replace the need of human expertise and critical thinking.

The value of scores and indexes is undeniable to enable an intuitive and fast understanding of progress in specific areas. However, we believe they cannot fully reflect the diversity of the contribution of PR and communication to the strategic objectives and license to operate as a company. We develop and own proprietary indexes, but we never treat them as a “black box” that we impose on our clients, independently of their priorities and specific context. Nor do we claim that they can replace taking a holistic approach to PR measurement, which is one of the specialties of our firm, leveraging multi-dimensional and multi-method research and analytics methodologies.

3/ Don't over index on real-time, but make sure you do adapt the speed of data collection with today's media and information ecosystem

There is no need to linger on the changes that have radically transformed the global media and information system over the last 10 years. Any communication and PR professional is acutely aware of the diffusion of influence and authority, the shift in power and influence between editorial media and social media, and the prominence (some would say dominance) of Facebook and Google in the way people consume, search, access and enjoy information. The acceleration of the speed of creation and consumption drives the increased possibility (and necessity) to monitor and analyze content in almost real time. This has transformed the way we measure and, most of all, optimize PR performance.

However, measurement frameworks also must enable us to take a step back. We need to articulate what changes fast and what changes slowly, map the ebb and flow, and understand the deep current of opinion affecting brand, reputation and trust. In our experience, deploying real time monitoring as well as deeper, slower paced measurement techniques is the way to support both immediate and long-term decisions. This is something that most the companies we work with value; particularly at a time where the latest tweet or google alert can (rightly or wrongly) drive major strategic shifts.

If the conversation around companies and brands can (and does) change over the course of a minute, the equity of a brand, the reputation and trust capital of a company takes much longer to evolve. We have supported companies facing some of the most daunting crisis situations possible, always observing that speed of insight delivery is critical to crisis management and recovery, and at the same time as being able to provide the long-term metrics on key attributes of the brand,



THE PR PROFESSIONAL'S Definitive Guide to Measurement

relationship with key stakeholders and audiences. This was the best way to make the best decisions possible; staying focused as we navigated the storm.

4/ Do invest in the baseline. Then differentiate and adapt goals based on a clear understanding of the starting point.

Leading a global communication or PR function for a company comes with many challenges. Some executives don't have enough resources or staff to deal with the high demands of a multi-market operation. Some have decent sized teams, but struggle to keep them aligned and keep on top of how their teams are performing. Some have managerial authorities over communications in a wide range of subsidiaries and geographies, and some do not. We've seen a trend towards measurement serving as a management tool for team leaders to set goals and targets, track progress and evaluate the performance of teams in each market and/ or business unit.

However, we often see organizations set targets without factoring the specifics and nuances of each geography or audience cluster. For instance, a global dairy brand leading in its home market might assume that a fair objective would be for its brand to be enjoying a share of voice of over 30% in each of the countries where it operates. This would be a big mistake to establish such target without investing in a thorough analysis of what the starting point is, when it comes to the brand, the culture and audience needs and opinions. If the brand has a 5% share of voice in the previous 6 months, getting to 10% SOV the following year would be an extraordinary achievement. Compare this to moving from 27% to 30% in a different market, which could be seen as an average performance. To be relevant and fair in associating PR measurement with goals, a proper baseline exercise, often based on retroactive analysis (when possible) is a best practice that many neglect to observe. When retroactive analysis is not possible, our recommendation is often to collect a minimum of 6 to 12 months of data before establishing targets for countries or communication teams.

Targets should never be set without factoring in the allocated resources needed (staff, budget etc.) and the level of control that local teams have over their strategy and decision making. If a company doesn't give a license to local teams to customize the PR strategy and tactics, they would have a legitimate case to challenge the principle of being measured against globally defined targets. Yet this is something much more common than one would expect. Global clients involving their team (and indeed, other agencies working on the business) in the design and engineering of the framework, and the setting of the goals and objectives is key to success. We have run this approach with many clients, including a large consumer goods multi-national, and this approach to change management and incentive setting has proved extremely effective. The measurement framework becomes a true rallying and energizing exercise for teams around the globe.

5/ Create a hierarchy of metrics, where specific metrics and goals align with companywide metrics and goals. Don't forbid the use of market specific metrics, but demand some alignment between local and global.

Global communication and PR leaders are increasingly focused on performance measurement, and are eager to demonstrate the contribution from PR and comms to the company strategic objectives. This is a sign of maturity and seniority of the communication function and overwhelmingly positive.

However, it also leads many to expect that metrics established at global level can accurately reflect the reality of the communication effort in very different context locally. The way we work with global organizations to satisfy both the need to report on a limited number of metrics, and the need

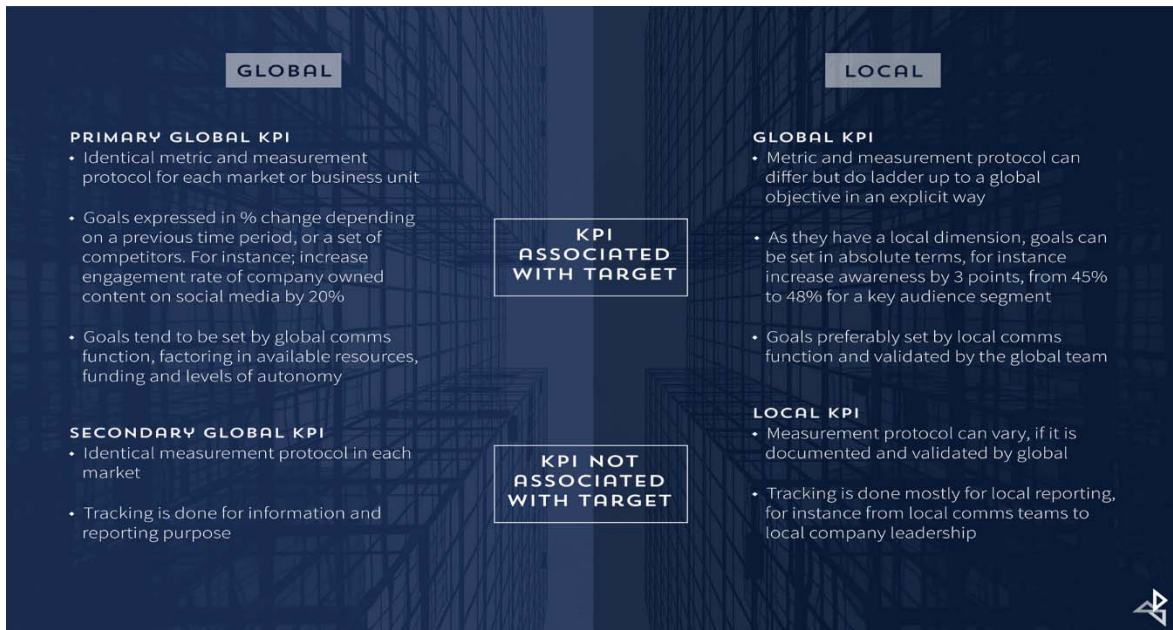


THE PR PROFESSIONAL'S Definitive Guide to Measurement

to recognize local and cultural specificities is to create a KPI (Key Performance Indicator) matrix differentiating:

- Global KPIs (consistent across markets)
- Local KPIs (laddering up to a global objective, but may well be different depending on the market)

The matrix should also incorporate the notion explored in point 4 about goal and objectives setting, to create a 2x2 matrix:



These broad principles are not by any means the only rules to observe, or pitfalls to watch out for but they can help communications professionals increase the efficacy of their effort to build and maintain a smart measurement framework.

In our experience of building global, multi-cultural, multi-market measurement frameworks, they require PR and analytics professionals to adopt what we call a 'fix and flex' approach. The solution deployed needs to combine a comprehensive, comparative approach that cuts across all countries, and, at the same time, be able to highlight the nuances of specific markets.

This approach demands strong collaboration with the clients we serve, yet it delivers superior results and long-term value. This approach also enables adoption of a broader definition of PR, integrating metrics traditionally associated with paid marketing, influencer marketing, owned media and public affairs. Most of all this approach combines structural fundamental and non-negotiable elements, with localized, customized, bespoke metrics.

This is the guarantee that our relationship with clients is always based on a deep understanding of their business goals, their communications goals and the resources allocated to each.

The battle for defining and articulating clear objectives is, after all, the mother of all battles for PR measurement. It is shockingly far from being won, and there is no magic wand to solve it, but I am deeply convinced that approaching measurement in the most strategic, transparent and concerted way with our clients is the only way to go.



THE PR PROFESSIONAL'S Definitive Guide to Measurement

Antoine's Top 3 Measurement Tips

1. **Over index on design.** Making your measurement report beautiful and heavily visual is not a luxury but a condition for success. Interactivity is a plus but looking great is a must
2. **Be holistic.** Don't measure things in isolation. There are no marketing swim lanes anymore and consumers appreciate information about a brand or a company as a whole. We should be measuring the experience consumers and stakeholders have across as many touch points as possible
3. **"Study the past if you would divine the future".** Investing in retroactive analysis is the base of any predictive modeling.



Antoine Harary

Global Managing Director, Edelman
Intelligence