

Guidelines for Setting Measurable Public Relations Objectives: An Update

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A NOTE TO THE READER:

This paper expands on and updates the thinking of the Institute's original Setting Measurable Objectives paper which was drafted in 1999 by Forrest W. Anderson, Independent Consultant, and Linda Hadley of Porter Novelli, along with contributions from members of the Institute for Public Relations Commission on Public Relations Measurement and Evaluation.

The authors of this update wish to acknowledge the fine work of the original authors. To their credit, the core principals of their paper have withstood the enormous changes which have affected business and the public relations profession during the decade since its publication.

We also wish to recognize the continued vibrancy and relevancy of the Institute for Public Relations and the Commission on Public Relations Measurement and Evaluation.

Sincerely,

Forrest W. Anderson (one of the two original authors)

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INTRODUCTION

In every business case – whether the organization is large or small; for-profit or nonprofit; local or global – there is an *objective*. Objectives may include generating a profit, approving legislation or giving back to the community. To advance the organization, those doing so need a clear understanding of the organization's aims. This is true for the public relations (PR) team and its agencies: The purpose of every public relations professional is to help his or her organization achieve its business objectives.

An effective public relations program is rooted in research which is used to set objectives, develop strategy and design tactics. The research foundation continues to be applied as one moves to program execution and concludes with the research-based evaluation needed to assess the extent to which the program met or exceeded the original research-based objectives. For the purposes of this paper, we focus on campaign (or program) objective-setting and strategy development, primarily in a business setting.

While each component of the public relations process is essential for success, the initial stage of objectives-setting research is the basis for the entire PR program. It provides a framework for strategy, execution, and evaluation. And, while setting measurable objectives is critical to public relations programming, it also is among the most frequently overlooked.

WHY SET MEASURABLE PUBLIC RELATIONS OBJECTIVES?

Here are six reasons for setting clear, concise and measurable objectives in public relations:

- *Objectives create a structure for prioritization:* Once your aim is clear, the focus and sequence of your strategy and tactics are clear.
- *Objectives reduce the potential for disputes before, during, and after the program:* If everyone agrees in advance on the objectives, it is less likely anyone will challenge the program's priorities and results.
- *Objectives focus resources to drive performance and efficiency:* A clear and shared sense of purpose distills program tactics and focuses financial and human resources on those areas on which they have the greatest impact.
- *Objectives help create successful programs by identifying areas for prescriptive change and continual improvement.* Over time, tracking performance against properly set objectives allows for corrective action, or positive adjustments.
- *Objectives set the stage for evaluation by making it easier for sponsors and team-members to determine if the PR program met or exceeded expectations.* Once those who are underwriting the PR investment understand and authorize measurable objectives, there can be no doubt as to whether the program met or fell short of the desired outcome at conclusion.
- *Objectives link the PR objective to the business objective.* Proper PR objectives are derived from the organization's business objectives. This makes the business case for the PR program. For example investing significant resources towards the promotion of "product A" when the company's future is pinned to the success of "product B" is not in alignment. However, if the PR objectives in support of "product B" are met or exceeded, the link between PR and the overall success of the business is much more tangible, especially among senior executives.

Just as the implementation of measurable PR objectives brings many benefits, their absence brings considerable risk, not the least of which is the potential for lack of understanding among executives and other team-members; loss of efficiency and dearth of resources.

HOW TO SET PROPER PUBLIC RELATIONS OBJECTIVES

PR objectives should be *meaningful, reasonable* and *quantifiable*. While the focus of this paper is on “measurable” objectives, it is just as important for objectives to *matter* and to be *within reach*.

In setting proper objectives, it is important to understand three widely-accepted results of public relations activity: *outputs, outcomes* and *business results*. However, it is not always necessary to set objectives for every type of result, only for those metrics relevant to a specific project or activity.

- *Outputs*: The results, often in the form of media coverage, coming from PR activities such as press releases, special events, collateral material, Web sites and other channels.
- *Outcomes*: Outcomes are recognized widely in the form of awareness, understanding, attitudes, preference and behavior. Outcomes are achieved as a result of outputs.
- *Business results*: Business results are commonly recognized as effects that make a direct contribution toward the organization’s goals and objectives such as increased sales, lowered costs or a higher stock price. They relate to what happens as a result of outputs and outcomes.

This lexicon is one of several used by PR professionals and is recommended here due to its simplicity. However, with simplicity also comes a lesser degree of precision. For more information on this subject of metrics see the following papers on the IPR website.

1. Using Public Relations Research to Drive Business Results – Paine et al
(http://www.instituteforpr.org/research_single/using_public_relations_research_to_drive_business_results/)
2. Public Relations Research for Planning and Evaluation and Guidelines for Measuring the Effectiveness of PR Programs and Activities – Lindenmann
(http://www.instituteforpr.org/research_single/relations_research_planning/),
(http://www.instituteforpr.org/research_single/measuring_activities/)
3. How to Measure PR’s Contribution to Corporate Objectives – Colletti
(http://www.instituteforpr.org/research_single/measure_prs_contribution/)

I: Linking PR Objectives to Organizational Objectives Make Them *Meaningful*

One of the profession’s most vexing challenges is “proving the value of public relations.” An example of a reasonable, meaningful and quantifiable value measure is “meeting or exceeding objectives” to which management and the PR team have agreed in advance. However, it is reasonable to expect that management’s goals for the organization will be more specific in terms of actual business performance. As such, obtaining a clear understanding of your organization’s business or performance goals is the first step in setting measurable objectives. And yet, as important as this step is, it is often omitted. When management asks what returns are generated from its investment in public relations, they are asking for evidence that communications activities have helped achieve business goals. Without a clear understanding, and in the absence of authorization from top management, the likelihood for success is greatly diminished, relying on luck rather than acumen.

Business goals might include:

- **Increasing business performance**, often measured in terms of sales, market-share, stock-price, earnings per share, etc.
- **Optimizing the use of labor and capital**, for example through increased productivity, greater efficiency or employee retention
- **Avoiding catastrophic loss** by, for example, mitigating a crisis, averting calamitous reputation damage or protecting market capitalization

How are these overarching business goals translated to outcomes that can reasonably be expected to be affected through and by public relations? In the ideal world, senior PR leadership has a “seat the table” beside other top executives, helping to pilot the organization. However, in many organizations, PR has not yet achieved this level of influence.

In any case, it is important to ensure – in advance – that public relations objectives are aligned with the business objectives. This alignment occurs at all three levels. First, PR department objectives are aligned with enterprise objectives in the organization’s planning document, be it a strategic plan or a scorecard. Second, PR function objectives are aligned with those of other business units in the organization, such as employee relations with HR, customer relations with marketing and various business/operational units or investor relations with Finance. Third, PR campaign or program objectives need to be aligned with the program objectives of HR, Marketing or Finance. Before creating your public relations objectives, you need to articulate the business objectives and use them as a guide. Remember, while organizations set deliberate plans for a year or say three years, these plans – and their resulting objectives and strategies – change in the period of the plan. Begin the public relations objectives-setting process by conducting as much internal research as you can to clarify and state your organization’s business objectives: annual reports, business plans, and business-strategy documents can be very helpful. Ensure that you have both the original plan as well as any change in objectives and strategies that emerged over the life of the plan. Don’t just look at the current plan, Examine plans from years past to understand how the enterprise has evolved.

To ensure PR objectives are linked to business objectives, we recommend one-on-one sessions with those executives who invest in or who evaluate PR programming. Questions might include:

- What is management trying to achieve and what will help or hinder our success, from an overall-business perspective?
- Who do you consider to be our priority stakeholders?
- What themes would the organization like to communicate to our key stakeholders?
- What response would management like from target stakeholders?
- How does management think PR programs can help achieve these goals?
- What does success look like? To what degree is this success “meaningful, reasonable and measurable?” How can we link success to objectives that are “meaningful, reasonable and measurable?”
- What is the optimal time-frame for completing these goals?
- What barriers has the organization or any of its units faced in the past that stood in the way of meeting the objectives that were set?

- What are our key competitors doing and how are we different?

Answers to these questions will help identify business goals and guide PR efforts in the most productive directions. It is often helpful to the PR practitioner to have anticipated possible answers and offer suggestions for each question. For example, if the public relations measurement includes data supporting the extent to which the organization's key themes were communicated and the degree to which they resonated among the target audience, this would link to business objectives even if the delivery or retention of these themes could not be quantifiably connected to a rise in share price, sales, funding or contributions.

II: Objectives which are Openly Negotiated Become More *Reasonable*

For public relations to be effective, everyone within the public relations objectives-setting process must be realistic about what a PR program can reasonably accomplish with fixed resources and within a specific time-frame. Without reasonable objectives, there is an increased likelihood for disappointment and frustration.

Industry benchmarks are useful when determining and aligning what can be reasonably accomplished. While one can undertake formal benchmarking studies, a convenient and cost-free source may be your local public relations associations: Many PR organizations conduct awards competitions, the entries and winners of which are made available for review. The competitions highlight "the best of the best" and provide very specific information, including program budgets, objectives and results. If you are using a public relations research vendor to help you evaluate your program, this vendor might have benchmarks available as well.

To ensure that objectives are reasonable, it is wise to:

1. Aggregate the opinions compiled from your conversations with organizational leadership (Step One, previously).
2. Compare these results with what you learn from the environmental analysis detailed in the pages that follow.
3. Synthesize this information to create an Objectives-Setting Guide to share with the executives whose opinions were gathered.

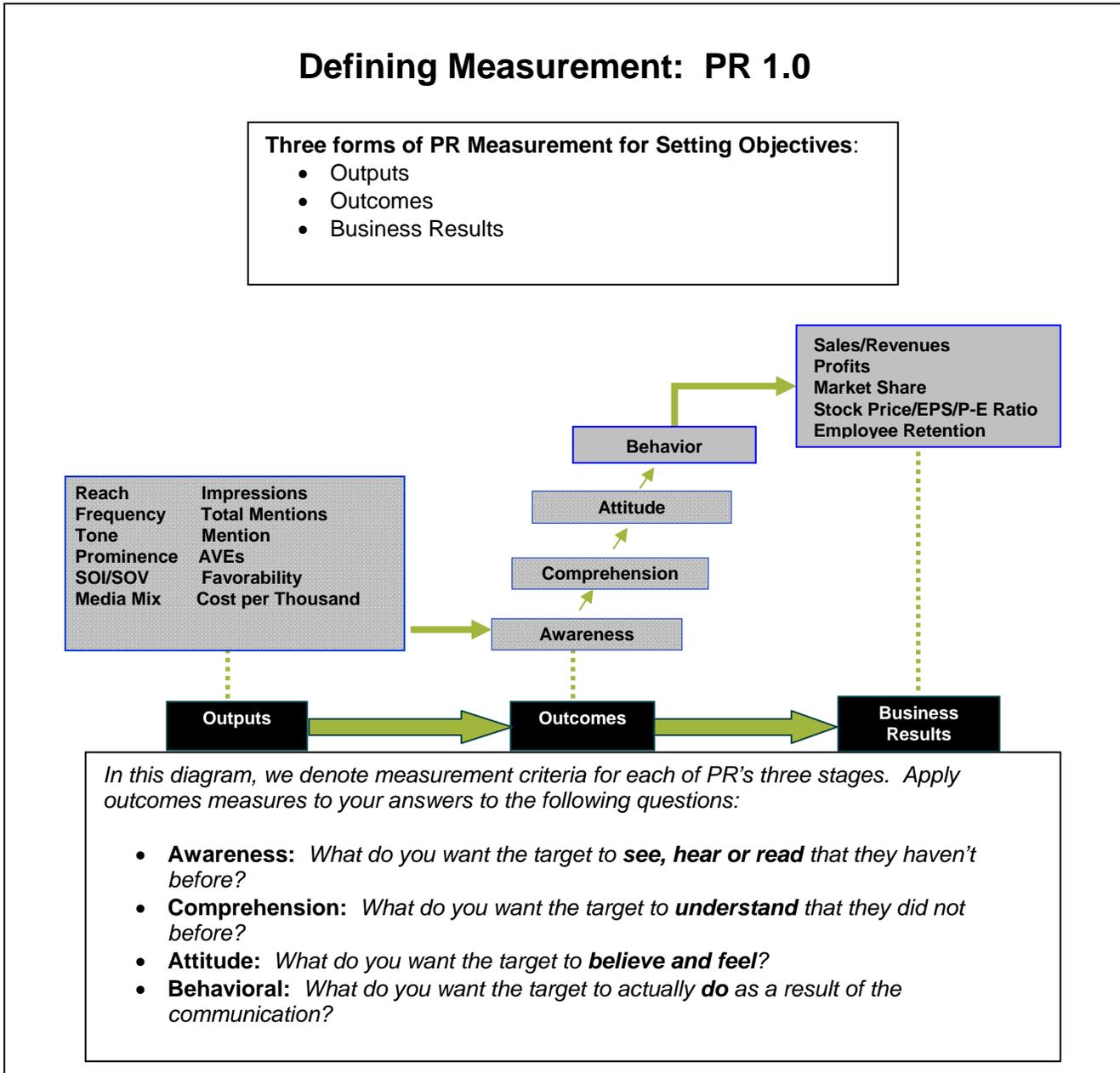
Through these one-on-one follow-up meetings, the PR professional can use the dialogue to determine "what is reasonable," negotiate the objective and obtain authorization-to-proceed.

III: Detailing Specifics: Make Objectives *Quantifiable*

To be quantifiable, both conceptually and practically, an objective must include answers to *what*, *who*, *how much* and *when*.

- ***What***: determine a desired output or outcome (metrics)
- ***Who***: specify one or several target audiences
- ***How much***: denote how much the metric should change to be successful
- ***When***: stipulate a time-frame in which the objective is to be achieved

What is more, objectives should be measurable in terms of *outputs*, *outcomes* and/or *business results* as defined earlier. In the following diagram and through the do-it-yourself worksheet which follows, one can identify key metrics for translating program elements into quantifiable objectives. The closer, however, one can set objectives to audience outcomes or business results, the better the business case for the PR program.



A WORKSHEET FOR SETTING MEASURABLE PUBLIC RELATIONS OBJECTIVES

STEP 1: Review Past Performance

Consider past objectives and results, as compared to those of your competitors, and determine what would be a reasonable improvement.

Outputs

In the table below, identify the output goals set last year (e.g., reach or tone); the results achieved last year; the results achieved by the main competitor last year for comparison; and finally, a reasonable incremental improvement for this year.

Output Type	Last year's goals	Last year's results	Last year's results for main competitor	Reasonable incremental Improvement
Volume of Stories				
Reach (circulation/audience)				
Volume of Stories in Target Media				
Target Media Reach (circulation/audience)				
Tone (% of Positive Stories Delivered)				
Quality				
Prominence (Headline/Lead Paragraph mentions)				
Media Mix Among Channels				
Company Spokespeople Citations				
Message Delivery (track % for individual message)				
Third-party Endorsements				

(analyst, expert, celebrity)				
What methods were used to measure last year's results and those of your competitor? Did last year's results meet or exceed the stated objective?				

Outcomes

In the table below, identify the outcomes objectives set last year; the results achieved; the results achieved by the main competitor last year for comparison; and finally, a reasonable incremental improvement for this year.

Outcomes Type	Last year's goals	Last year's results	Last year's results for main competitor	Reasonable incremental Improvement
Awareness				
Comprehension/ Understanding				
Attitude & Preference				
Actions & Behavior				
What methods were used to measure last year's results and those of the competitor?				

Business Results/ ROI

In the table below, identify the business results goals set last year and the results achieved; the results achieved by the main competitor last year for comparison; and finally, a reasonable incremental improvement for this year.

Business Results/ ROI type	Last year's goals	Last year's results	Last year's results for main competitor	Reasonable incremental Improvement
Revenues				
Market share				
Employee retention				
Profits				
Regulatory actions				
What methods were used to measure last year's results and competitor's results?				

STEP 2: Write Objectives

Formulate the objective(s) of the PR campaign or activity. Remember, state objectives in a way that is reasonable, measurable and meaningful – articulating what you want to change, among whom, by how much and by when.

Output Objectives

Sample output objectives:

- **Impressions:** Create 10,000,000 impressions through 200 placements in national print and broadcast outlets that mention study findings by the end of the campaign in June.
- **Reach:** By the end of the second fiscal quarter in June, 2009, reach 35% of registered dietitians and nutrition professors with “leadership” messages through placements in top 20 target markets.

Your output objective(s):

Outcomes Objectives

Sample outcomes objectives:

- **Awareness:** Raise awareness of “cleaning power” among women 25-34 from 20% last year to 50% this year.
- **Comprehension:** Create an understanding of insurance pricing models among 75% of insured adults by the end of the campaign in November.
- **Attitude:** By the end of the year, convince 10% of customers that bank fees are an acceptable charge.
- **Behavior:** Between this year and next, increase from 15% to 25% the percent of insured customers who recommend our brand to their friends or family.

Your outcomes objective(s):

Business Results/ ROI Objectives

Sample business results goals:

- To retain 10% more employees this year than in the previous year.
- To add \$1,000,000 in PR-attributable sales in the new year
- To gain approval on pending regulatory action during the current session

Your business/ROI objective(s):

CHECK-LIST

As you work toward setting measurable public relations objectives for your program, we offer the following reminders:

ASSUME NOTHING: START WITH RESEARCH

Use research to assess the current business and public relations environments, to identify opportunities, and to gather sufficient information for your objectives to be relevant in light of the environment you find and the opportunities you seek. Your initial research should be based on preliminary program goals. Supporting your hypothesis will provide you with the means to answer these key questions: *What is the current environment? What place do we hold within the current environment? Why is this so? Is it likely to continue? What do we need to know now so that we can improve our performance?*

Share research with management and your team so the results can be applied for greater understanding and better planning. The metrics associated with the current environment—the quantity and quality of marketing and public relations outputs as well as existing levels of awareness, attitudes, and behavior—are the metrics by which you will set your objectives at the beginning of the programming process, measure program progress during the program, and assess performance at its conclusion.

With a solid understanding of your business environment, align your findings with the objectives of the business and the opinions and attitudes of its leadership.

REMEMBER THAT OBJECTIVES ARE DIFFERENT FROM ACTIONS

Be sure your objectives are a guide to action rather than a chronicle of activity: “Send out press releases,” or “sponsor special event” are activities that might help one meet an objective, but they aren’t objectives. Activities should be tracked in their own right as measures of productivity. But demonstrating that you have sent out 20 percent more press releases than last year offers no information about whether these releases met *their* objectives. A special event, in isolation, doesn’t mean anything unless it satisfies specific criteria. And the TV interview is meaningless if the program is not seen by the people you’re targeting or if the interview doesn’t allow delivery of key campaign messages. So, while these examples qualify as a tactical to-do list, they are not objectives.

Objectives emphasize ends rather than means: If any of your objectives begin with words such as distribute or create, then you do not have an objective, you have parts of a tactical plan. Good objectives identify outputs, outcomes, and business results rather than tasks, strategies, or deliverables. The latter are important in helping to achieve the desired results, but they are simply the means to an end. Instead, think of what outcome or business result a particular strategy or supporting tactic is designed to stimulate.

REMEMBER TO BEGIN WITH THE DESIRED RESULT IN MIND

Once you've defined the business objective, work backwards to map the links between those objectives and what PR can do at every stage of the communications process. As the schematic shows (1), doing so requires recognizing how PR outputs drive audience outcomes, and, in turn drive business results.

REMEMBER TO GET AGREEMENT FROM SENIOR MANAGEMENT

After initially discussing the organization's business objectives and how PR objectives relate to them, show key executives your three sets of objectives: outputs, outcomes and business results. The executives need to understand and agree to these. In addition, work with executives to ensure that you understand the business goals and objectives of the organization prior to completing your objectives exercise. Work to understand the target audiences, the time frame, other business actions and activities, long-term business objectives, and subordinate short-term objectives.

IN CONCLUSION

Management guru Peter F. Drucker said, "Objectives are not fate; they are direction. They are not commands; they are commitments. They do not determine the future; they are means to mobilize the resources and energies of the business for the making of the future."

In many cases, the public relations profession has allowed itself to rely on indeterminate goals in order to avoid being proven a failure. But by doing so, we disallow ourselves demonstrable success. The dictates of business demand more, and public relations will only earn higher esteem and more influence within the business mix, if it sets and demonstrates it has achieved measurable objectives clearly aligned with business objectives.