Paine Publishing's Best Practices & Standards-Compliant Checklist
Use alongside any campaign or program you plan to measure

A. Define your measures of success, KPIs, and dashboard
- ☐ Make a list of people who will want to see a report on your campaign/program
- ☐ Set up a meeting with those people to reach consensus on business goals & measures of success, then create meeting agenda
- ☐ In this meeting, discuss and define the following:
  - ☐ Target audiences
  - ☐ Goals
  - ☐ Who/what the benchmark will be
  - ☐ Key Performance Indicators (KPIs)
- ☐ After meeting, summarize the agreed upon definitions in a document. Also include a list of the key metrics (including the KPIs) you'll be reporting on in your dashboard
- ☐ Ask senior management to sign off on the KPIs and dashboard
- ☐ Based on approved KPIs, make a list of data you'll need to report on

B. Select a research tool
- ☐ Look at each metric & pick the most appropriate measurement tool: survey research, web & social analytics, or media content analysis
- ☐ Consult our [Measurement Vendor Selection Chart](#) to narrow your search

C. Select a listening/monitoring tool
- ☐ Make list of search terms you need to know about (e.g. topics, peer institutions, etc.)
- ☐ Decide if your campaign/program is domestic, international (or some combination of the two)
- ☐ Make list of channels you need to monitor
- ☐ Make list of quantitative data you'll need (e.g. number of comments)
- ☐ Make list of qualitative data you'll need (e.g. spokesperson quote)
- ☐ Estimate volume of mentions using Google News or a prior monitoring program
- ☐ Decide if you need an automated system with random sampling and/or human oversight or manual review
- ☐ Decide if you will be doing this work in-house or with measurement partners
  - ☐ If you need partners, create an RFP in order to accurately compare vendors
  - ☐ Use the [Sources & Methods Transparency Template](#)

D. Select a survey tool
- ☐ Determine how quickly you need the results, then decide on a budget
- ☐ Define your audience and source the list of desired respondents

☐ Form a clear, accurate reading on the Internet habits of your desired respondents (e.g. if they are primarily online then an online survey is acceptable)

☐ If you are planning to use an outside research firm, give them budget

☐ If you are using a free online survey tool, make sure it has the capacity to ask the questions you need answered

☐ Contact a professional researcher and have him/her review and test your survey

☐ Test your survey on a sample of your respondents, then review and fix any issues

☐ Start the survey, then check results after 5 days to verify it's working

E. Select a web analytics tool

☐ Make list of specific campaigns or programs you are going to measure

☐ Define specific goal conversion criteria

☐ Create unique URLs (sources) and mirror landing pages for each campaign/program so you can track the traffic

☐ Make list of engagement data you'll need (e.g. unique visitors to the "About" webpage)

☐ Make list of sales/lead data you'll need

☐ Contact the person who manages your organization's website and determine what data they have that you need.

☐ Also determine what data they don't have. Then decide on how your organization will proceed to collect it

☐ Figure out if you need additional tools
  ☐ If required, create an RFP for web data collection & analysis

F. Analyze data and report results

☐ Put all relevant data into an Excel spreadsheet

☐ Based on your KPIs and definitions of success, force rank all your programs from 1 to the number of programs you are measuring

☐ Assign a "resource investment" category to each program that reflects the total amount of resources that the program required
(We recommend the following 4 categories: Low, Medium, High, Very High)

☐ Create a quadrant chart and plot where each program falls in terms of engagement and resource use
  ☐ Look for significant failures: Where did a program not deliver?
  ☐ Look for exceptional successes: Where did a program really deliver?

☐ Drilldown into the data to determine cause & effect

☐ Put the most relevant data (and charts) into a PowerPoint presentation

☐ Report results, draw insights, and make actionable recommendations