

How to Define Custom Indexes and Metrics



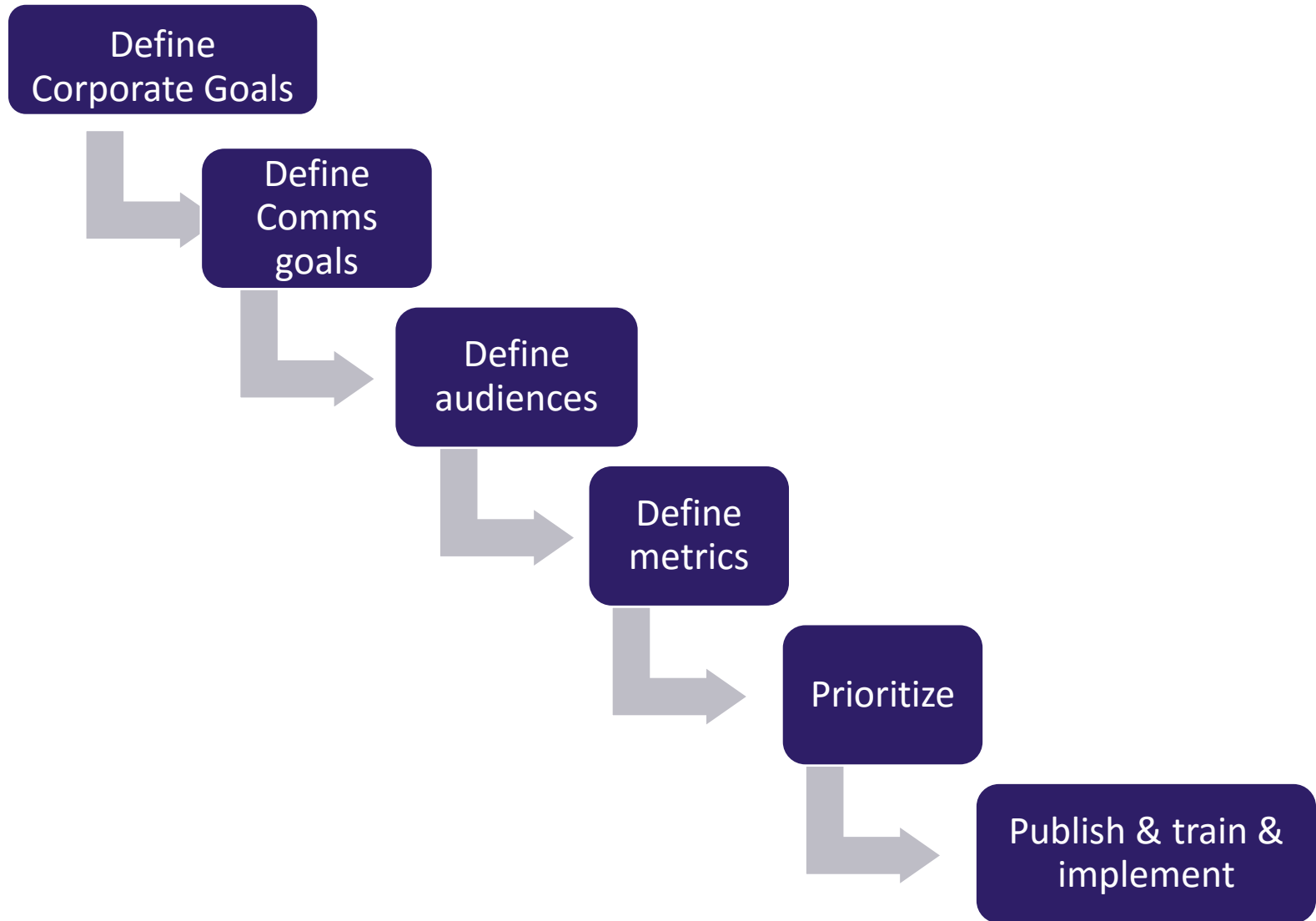
Measurement Base Camp
Shankhassick Farm
September 15, 2016

What makes a perfect communications KBI?

- ▶ You become what you measure, so pick your metrics carefully
- ▶ KBI = Kick Butt Index
- ▶ The Perfect KBI:
 - ▶ Is actionable
 - ▶ Is there when you need it
 - ▶ Continuously improves your processes & gets you where you want to go



Process



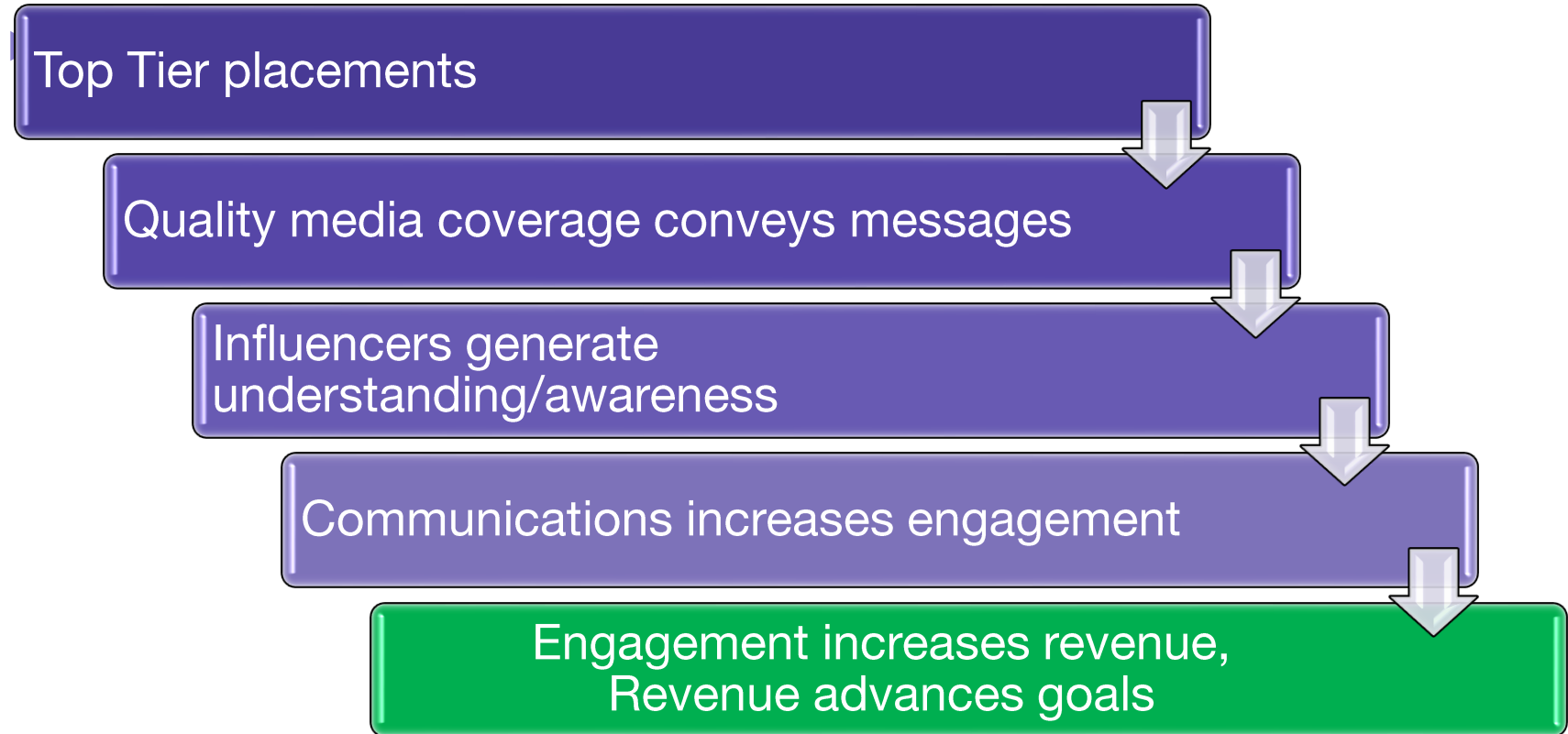
Remember that Champagne Moment?

- ▶ What return is expected?
 - ▶ Define in terms of the mission
- ▶ Define your champagne moment
 - ▶ If you are celebrating complete 100% success a year from now, what is different about the organization?



Definitions of “Success”

▶ What’s the path?



Goals → Objective → Metrics

Business Goal	Communications Objectives	Communications Activity	Activity Metrics	Outcome Metrics
Increase revenue	Advance our position on key competitive battles	Engage with customers to increase understanding of issues	<ul style="list-style-type: none"> % increase in desirable share of voice % increase in share of spokespeople quoted 	<ul style="list-style-type: none"> % Increase in perceptions of company as “a leader in the field” % of stakeholders who understand the issues
	Increase consideration and preference	Increase engagement via social media (paid & earned)	<ul style="list-style-type: none"> % increase in engagement with owned content 	<ul style="list-style-type: none"> % increase in consideration and preference % increase in the marketable universe
	Increase understanding and support for our messaging	Dissemination of key messages	<ul style="list-style-type: none"> % increase in % of earned media containing a key message 	<ul style="list-style-type: none"> % increase in understanding of and belief in our key messaging
Reduce Costs	Meet budget targets thru increased efficiency and smarter decisions making	Rapid response to reputational threats or opportunities	<ul style="list-style-type: none"> % decrease in share of negative coverage 	<ul style="list-style-type: none"> % reduction in resources devoted to reactive responses
		Engage with prospects via email & other lower-cost options	<ul style="list-style-type: none"> % increase in click thrus and conversions from communications activities 	<ul style="list-style-type: none"> % reduction in cost per message communicated

Defining High-Quality Coverage: The Quality Score

Desirable Criteria	Score	Undesirable Criteria	Score
Positive: Leaves reader more likely to purchase, work for, or invest– OR leaves reader less likely to oppose	1	Negative: Leaves reader less likely to purchase, work for, or invest OR more likely to oppose	-2
Contains one or more positive messages	3	Contains one or more negative messages	-3
Event/Program is mentioned	2	No Event/Program is mentioned	0
Positive headline	2	Negative headline	-1
Third-party endorsement	1	Recommends competition	-2
Contains desirable visual	1	Contains undesirable visual	-2
Total Score	10	Total Score	-10

Criteria for Media Quality

▶ Positive:

- ▶ Mentions of the brand
- ▶ Positive brand mentions
- ▶ Key messages
- ▶ Customer quoted positive
- ▶ Analyst quoted
- ▶ Positioned as trusted partner
- ▶ Positioned as vendor of choice
- ▶ Recommendation
- ▶ Call to action

▶ Negative:

- ▶ Omitted
- ▶ Negative tone (less likely to support, buy from, invest in, work for)
- ▶ No key message
- ▶ No quote
- ▶ Inaccurate

Social Media Engagement Index

Action	Score
“Like”/Follow/Open/+1	0.5
Favorites/Opens/Views	1
Comments	1.5
Shares content	2
Signs up to receive email or other owned content	2.5
Shares a link to an owned site	2.5
Total Score	10

Definitions

- ▶ Normalized
- ▶ Validated
- ▶ Index



Southwest Airlines – Employee Engagement Index

Employee Engagement Index Desired

Southwest has defined a “Perfect 10 Engaged Employee” as one who:

- Is willing to expend discretionary time on SWA activities
- Participates in Preparedness Training
- Volunteers for community efforts
- Attends events
- Likes Communications content
- Watched video

Those attributes are translated into metrics on the dashboard as follows:

Is willing to expend discretionary time on SWA activities	Employee Pulse Survey Responses
Participates in Preparedness Training	Recognition Index
Volunteers for community efforts	Recognition Index
Attends events	Recognition Index
Likes Communications content	SWA Life Sentiment of Blog Posts Internal
Watched video	Video Views

Southwest Airlines

Actual data:

Programs	Details	January	February	March	Q1	April	May	June	Q2	July	August	September	Q3	October	November	December	Q4 Total
Incentive Programs	Perfect Attendance	29,437	28,230	28,638	86,305	28,465	28,357	28,969	85,791	29,202	29,247	29,402	87,851	29,799	30,729	30,526	91,054
Incentive Programs	Station Trainer Incentive	1,112	0	35	1,147	919	55	1	975	1,071	0	0	1,071	1,284	0	0	1,284
Incentive Programs	Contests & Other	0	0	0	0	0	0	42	42	0	0	0	0	0	0	0	0
Day-to-Day Recognition	LUV Reports	1,362	1,216	1,465	4,043	1,306	1,385	1,635	4,326	1,253	931	782	2,966	1,023	1,136	932	3,091
Day-to-Day Recognition	On The Spot Awards	3,443	4,796	6,556	14,795	7,960	6,966	7,644	22,570	7,207	12,240	10,848	30,295	18,722	16,181	34,723	69,626
Day-to-Day Recognition	Gary's Shout Out	4	6	2	12	22	73	4	99	2	6	3	11	5	4	2	11
Day-to-Day Recognition	Employee Life Event Recognition	2,019	1,782	1,998	5,799	2,408	2,444	2,475	7,327	1,297	1,473	1,854	4,624	2,645	2,267	2,534	7,446
Day-to-Day Recognition	Anniversary/Bday/Special Mailings									8,628	8,416	8,430	25,474	8,564	7,796	7,517	23,877
Day-to-Day Recognition	Paper Kick Tails	13,382	9,479	7,468	30,329	8,785	9,514	11,286	29,585	13,273	12,187	12,856	38,316	12,501	11,445	14,887	38,833
Day-to-Day Recognition	eKick Tails	5,663	6,275	7,906	19,844	7,617	8,007	7,537	23,161	7,143	13,689	15,574	36,406	21,734	21,670	23,362	66,766
Day-to-Day Recognition	LUV Mail	32	24	23	79	33	24	26	83	26	59	26	111	27	19	33	79
Customer Commendations	A-List Preferred Customer Kick Tails	5,212	4,467	4,181	13,860	3,730	4,034	4,482	12,246	4,912	6,031	6,189	17,132	7,434	7,334	8,445	23,213
Customer Commendations	A-List Customer Kick Tail											476	476	2,040	2,962	4,435	9,437
Customer Commendations	External Customer Commendations	5,849	5,685	5,566	17,100	2,576	3,407	4,546	10,529	8,118	7,231	6,351	21,700	5,807	5,682	5,562	17,051
Formal Recognition	Special Awards	0	0	0	0	0	0	38	38	0	0	0	0	0	0	0	0
Formal Recognition	10-Year Achievement Award	0	0	0	0	0	0	0	0	0	0	38	38	0	0	0	0
Formal Recognition	President's Award/Celebrations	0	0	0	0	0	139	0	139	0	0	0	0	0	0	0	0
Formal Recognition	Heroes of the Heart	0	6	0	6	0	0	0	0	0	0	0	0	0	0	0	0
Formal Recognition	Winning Spirit (Award/celebrations)	0	0	0	0	105	0	0	105	29	0	0	29	34	0	0	34
Formal Recognition	Our Star	1	1	1	3	1	1	1	3	1	1	1	3	1	1	1	3
Formal Recognition	Military Appreciation Program	863	866	870	2,599	479	480	485	1,444	885	898	892	2,675	913	921	903	2,737
Formal Recognition	Volunteers of LUV	0	0	0	0	22	0	0	22	0	0	0	0	0	0	0	0
Formal Recognition	Southwest Star Awards/Recog	278	251	196	725	689	518	363	1,570	424	270	184	878	379	248	334	961
Formal Recognition	Monthly Kick Tail Winners	51	51	50	152	50	47	53	150	50	50	50	150	50	50	50	150
Formal Recognition	Service Awards	0	0	0	0	1,761	1,551	1,682	4,994	1,258	1,316	1,365	3,939	1,676	1,551	1,353	4,580
Formal Recognition	Milestone City Anniversaries	0	0	0	0	0	350	0	350	0	0	150	150	1	2	0	3
Informal Recognition	Culture Blitzes	2,100	0	2,435	4,535	115	735	375	1,225				1,638	2,020	0	0	2,020
Informal Recognition	Southwest Rally	0	3,900	4,167	8,067	0	0	0	0	0	0	0	0	0	0	0	0
Informal Recognition	10-Year Gala (mailings & event)	0	0	0	0	0	0	0	0	2,329	2,329	604	5,262	0	0	0	0
Informal Recognition	Anniversary Banquet Recognition	0	0	0	0	0	0	3,350	3,350	0	0	0	0	0	0	0	0
Informal Recognition	Chili Cookoff (attendance)	0	0	0	0	4,920	0	0	4,920	0	0	0	0	0	0	0	0
Informal Recognition	Spirit Party	0	0	0	0	0	0	0	0	0	0	0	0	1,658	0	0	1,658

You can only develop a longitudinal index when you have valid data.

Thank You!

- ▶ For more resources on measurement, check out Paine Publishing's [Measurement Mall](#)
- ▶ For a copy of this presentation or for any questions, email me: measurementqueen@gmail.com
- ▶ Or call me: 1-603-682-0735

