# Paine Publishing

## How To Use the Barcelona Principles to Save Time & Money, Win Budget Battles, Make Better Decisions, and more!

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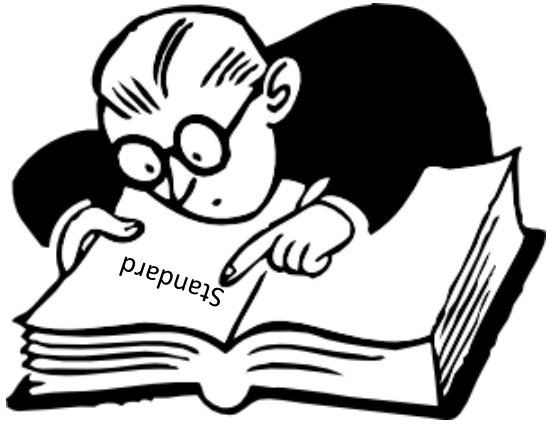
# What is a Standard?

- A published specification that:
  - **establishes a common language**;
  - **contains a technical specification** (or other precise criteria);
  - is **designed to be used consistently** as a rule, guideline, or definition.



# Why do we need Standards?

- **To get accurate results.**
  - Without standards, comparisons are inaccurate
- **To save time.**
  - Standard ways of doing things eliminates long debates about methodology
- **To make good decisions with reliable data.**
  - Chasing fans and followers is insufficient
- **The Marketplace is demanding them.**
  - Common language for clients, agencies and research firms
  - Unify perspective/metrics across communications disciplines
- **It enables benchmarking.**
  - Enable comparison across programs/brands/organizations
  - Fosters competition based on insights not “black boxes”

# First Came The Barcelona Principles

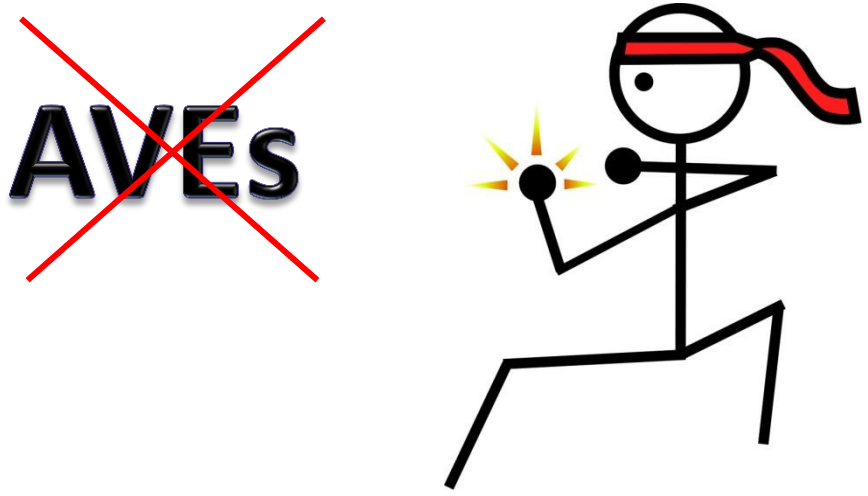
A set of principles to guide the practice of PR and social media measurement. They are:

1. Importance of goal setting & measurement
2. Measuring the effect on outcomes is preferred to measuring outputs
3. The effect on business results can & should be measured where possible
4. Media measurement requires quantity & quality
5. Earned media values/AVEs are not the value of PR
6. Social media can & should be measured
7. Transparency & replicability are paramount to sound measurement

To show your support, use the hashtag #BeBarcelonaCompliant on social media.

# What about AVEs?

- The Barcelona Principles do not support the use of earned media values/advertising value equivalencies.
- While the rejection of AVEs as a measure of public relations tends to generate the most controversy and conversation, it's important to remember the Barcelona Principles go deeper than that.



# Then Came Standards

In response to the Barcelona Principles, industry associations came together to create standards of best practices for measuring PR and social media.

**The Coalition was formed to set best practices for Traditional Media Standards.**
**The Coalition consists of:**

- Council of Public Relations Firms
- Global Alliance for Public Relations & Communication Management
- Institute for Public Relations
- International Association for Measurement & Evaluation of Communication
- Public Relations Society of America

**The Conclave came together to set standards for Social Media Measurement.**
**The Conclave consists of:**

Network of 40+ individuals who represent a vast collection of companies, public relations & social media agencies, and industry associations that work with paid, owned, and free media.

All complete standards may be viewed at http://painepublishing.com/standards-central-2/

# The Coalition

The Coalition published, tested, and validated standards for:

1. Definition of an Item of Content
2. Circulation
3. Mentions
4. Sentiment
5. Quality Elements

If you are initiating a traditional media measurement program, you and any vendors you consider should be adhering to The Coalition's standards definitions and best practices.

# The Conclave

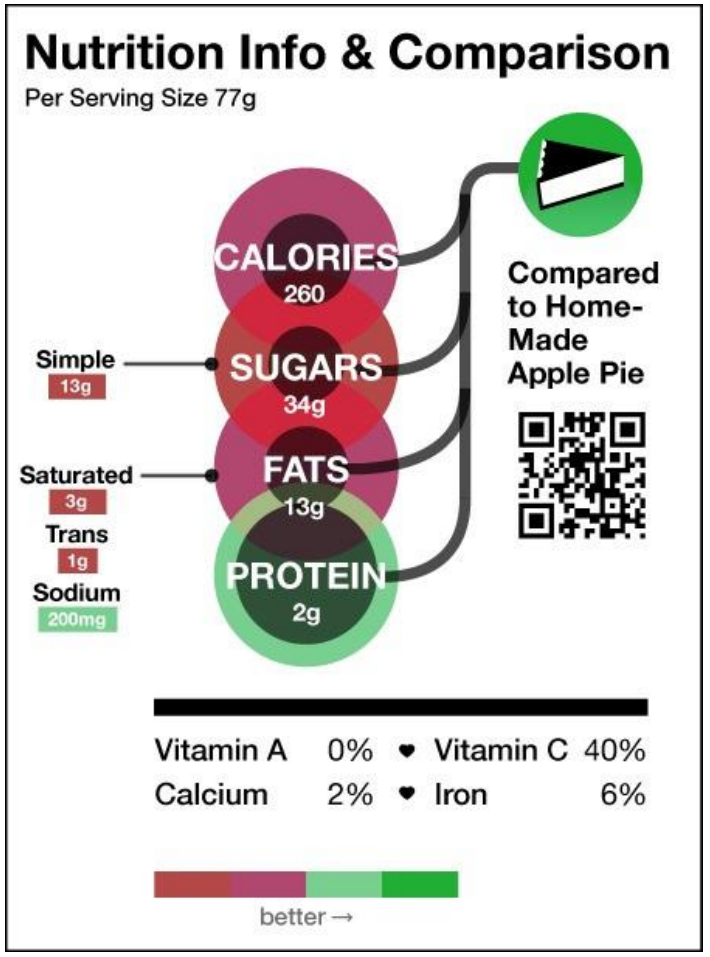
The Conclave published Standards for:

1. Content & Sourcing
2. Reach & Impressions
3. Engagement & Conversation
4. Opinion & Advocacy
5. Influence
6. Impact & Value

For more info please visit www.smmstandards.com

# #1 Content & Sourcing

- All social media measurement reports should include a standard “Sources & Methods Transparency Table” (see next slide).
- This table will that help your clients know “what’s inside” the product for full transparency and easy comparison (just like a food nutrition label).



# Sources & Methods Transparency Table

| | |
|---|---|
| **Timeframe Analyzed** | |
| **Research Lead(s)** | |
| **Channels Analyzed** | |
| **Data/Content Sources** | |
| **Analysis Depth** | ☐ Automated ☐ Manual ☐ Hybrid ☐ All Content Reviewed ☐ Rep. Sample |
| **Source Languages** | |
| **Search Languages** | |
| **Sentiment Coding** | ☐ Automated ☐ Manual ☐ Hybrid ☐ Manual Sampling: _____<br>☐ 3-pt scale ☐ 5-pt scale ☐ Other scale ☐ At entity level ☐ Paragraph/doc level |
| **Spam/Bot Filtering** | ☐ Automated ☐ Manual ☐ Hybrid ☐ Includes news releases ☐ Excludes releases |
| **Metrics Calculation and Sources** | |
| **-- Reach** | |
| **-- Engagement** | |
| **-- Influence** | |
| **-- Opinion/Advocacy** | |
| **Proprietary Methods** | |
| **Search Parameters** | See full search string list on page ___ of this report |

# #2 Reach & Impressions

- All impression numbers are flawed for a variety of reasons.
- Multipliers should never be used.
- A divider is more appropriate because it is less than 5% of what is posted is actually seen.
- The term “Potential Impressions” is preferred and must be specific to a particular channel – i.e.
  - For Twitter OTS is the number of first line followers
  - For Facebook it is the number of likes to a page

# #2 Reach & Impressions (continued)

- **Item**: a post, micro-post, article, or other instance appearing for the first time in a digital media.
- **Reach**: the total number of unique people (deduped) who had an opportunity to see an ITEM or a valid reproduction of that ITEM across any digital media.
- **Impressions**: represent the gross number of items that could have been seen by all people, including repeats. The term “displayed” applies across channels, browsers, devices, and other methods by which an individual might see an item.
- **Mention**: refers to a brand, organization, campaign, or entity that’s being measured.
  - Mentions are not recommended

# Impressions are not awareness. Where's the "So What?"

MSM → Online → Social Media

Eyeball counting → HITS → Outcomes

# #3 Engagement & Conversation

- **Engagement**: some action beyond exposure/in response to content on an owned channel – i.e. when someone engages with you.
- **Conversation**: online or offline discussion by customers, citizens, stakeholders, influencers, or other third parties about your organization.
- Any measure of Engagement & Conversation must be tied to the goals and objectives.
- Engagement & Conversation occurs offline and online, thus both must be considered.
- Engagement should be measured by the % of your audience that is engaged, and the % engagement for each item published.

# #3 Engagement & Conversation (continued)

- Engagement counts such actions as: likes, comments, shares, votes, +1s, links, retweets, video views, content embeds, etc.
  - Engagement types and levels are unique to specific channels but can be aggregated for cross-channel comparison.
  - Engagement should be measured by the percentage of your audience engaged by day/week/month; and the percentage of engagement for each item of content your organization publishes.
- Conversation counts such items as blog posts, comments, tweets, Facebook posts/comments, video posts, replies, etc.
  - Conversation types and levels are unique to specific channels but can be aggregated for cross-channel comparison.

# #4 Opinion & Advocacy (including Tone & Sentiment)

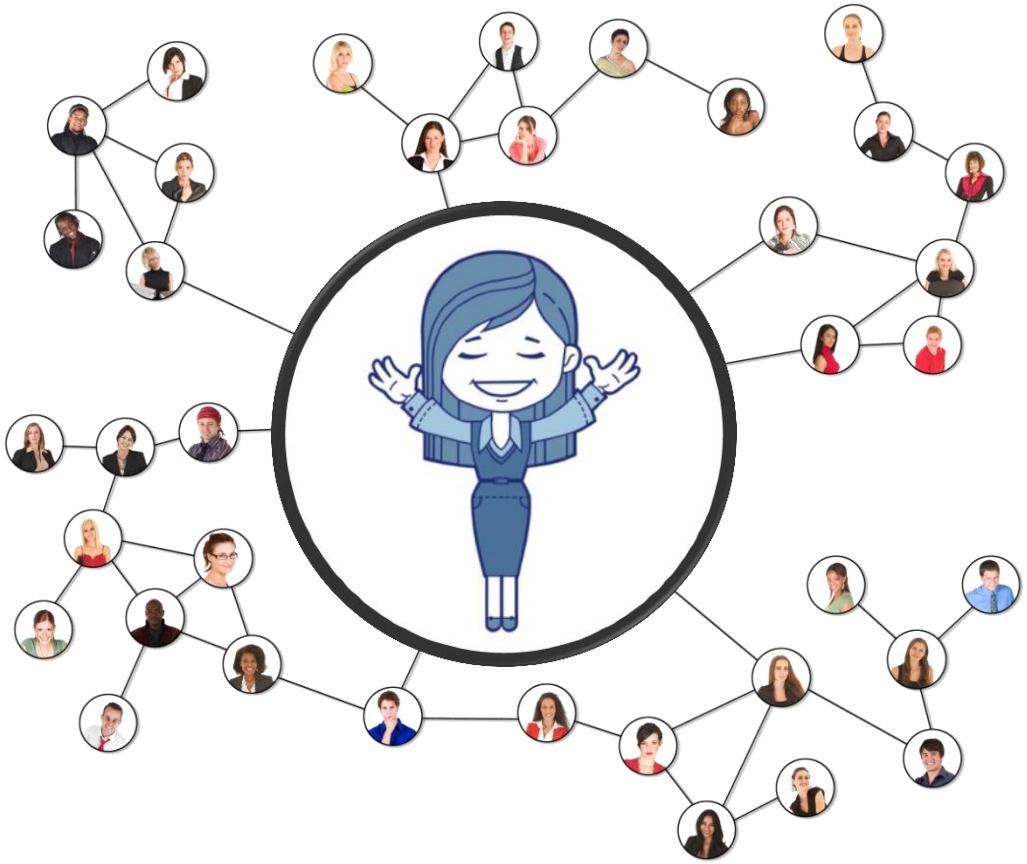
- **Opinion:** a view or judgment formed about something, not necessarily based on fact or knowledge...It is articulated and associated to the speaker.
- **Advocacy** (n) vs. (v) is publicly stated support for or recommendation of a particular cause or policy. Advocacy requires a level of expressed persuasion.
- The key distinction between “advocacy” and “opinion,” is that advocacy must have a component of recommendation, or a call to action embedded in it. Whatever process is defined and applied, it must be used consistently throughout any analysis.

# #4 Opinion & Advocacy (including Tone & Sentiment) continued

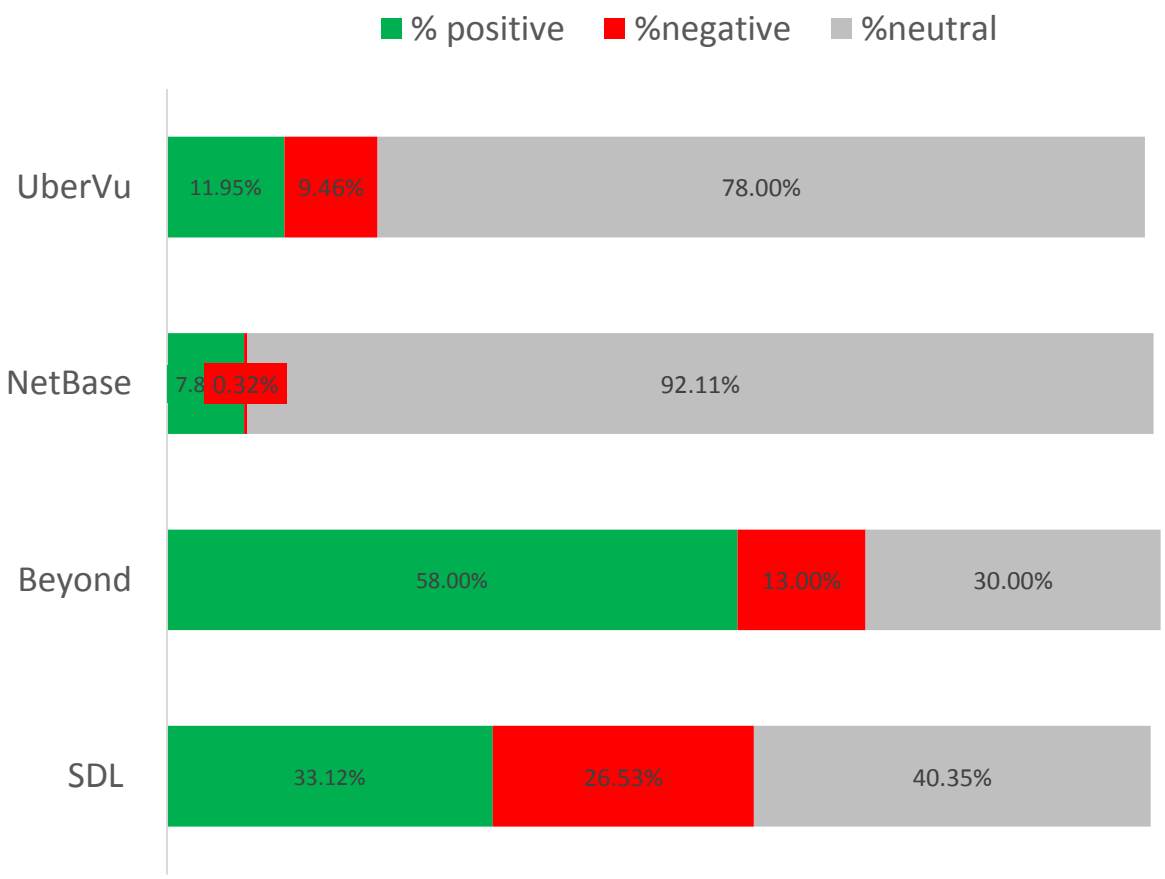
- **Sentiment:** the feelings an author is trying to convey, often measured through context surrounding characterization of object.
  - Sentiment reliability varies by vendor and approach – therefore coding definitions, consistency, and transparency are critical
- Opinions, recommendations, and other qualitative measures are typically more valuable than raw sentiment and increasingly measurable:
  - Opinions (“It’s a swell product”)
  - Recommendations (“Try it” or “avoid it”)
  - Feeling/Emotions (“That product makes me feel happy”)
  - Intended action (“I’m going to buy that product tomorrow”)

# #5 Influence

- **Influence**: the ability to cause or contribute to a change in opinion or behavior.
- Adhere to WOMMA Standards
- Influence cannot be expressed in a single score or algorithm.
- Should include some combination of the following elements:
  - Reach
  - Engagement around individual
  - Relevance to topic
  - Frequency of posts around the topic
- If an individual scores a 0 on one element, then they aren't influential.



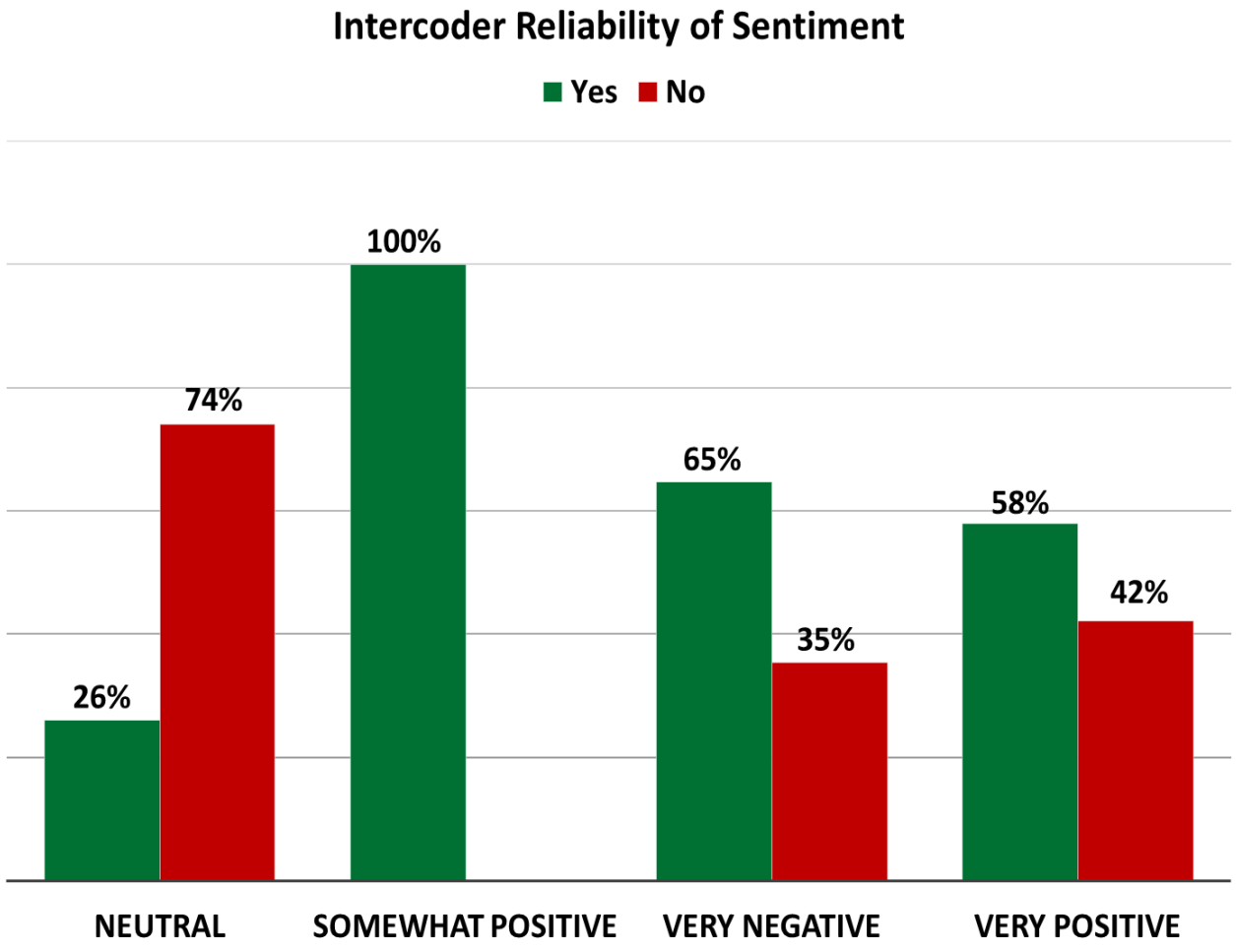
# Without Standards what you know is limited

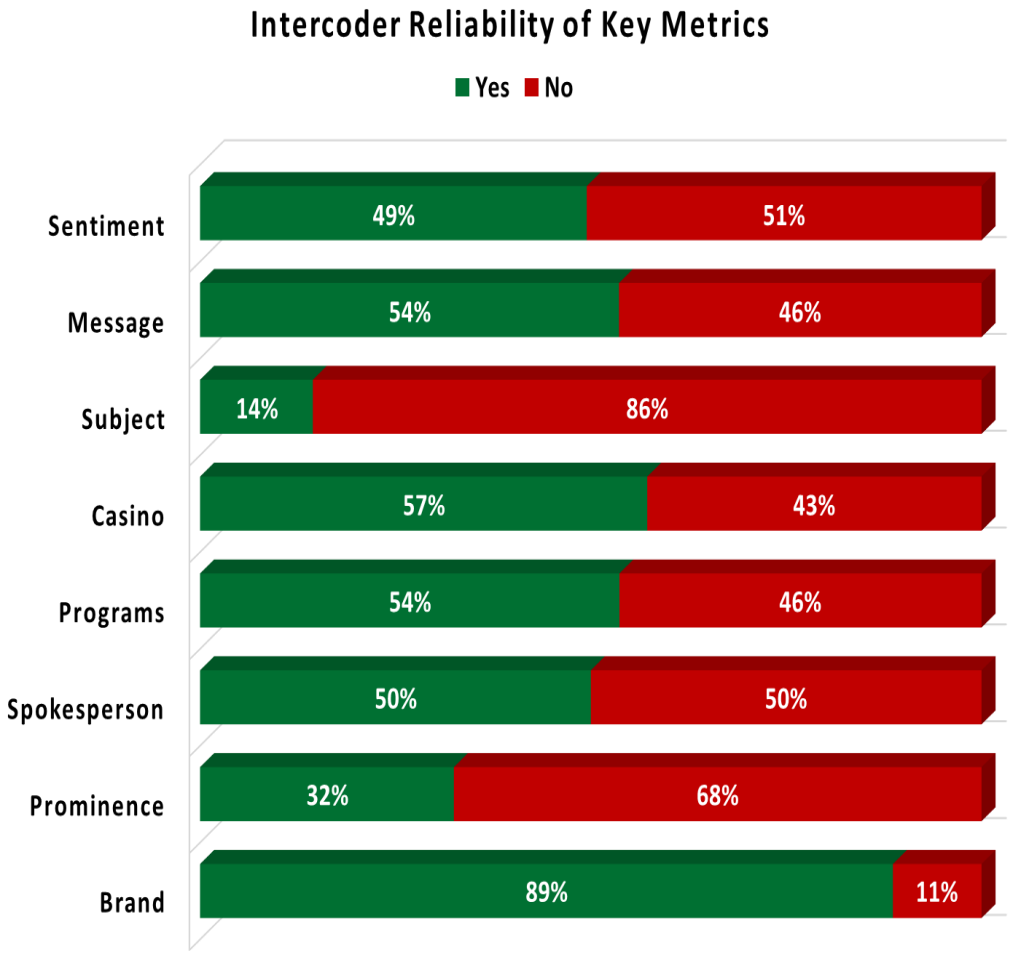



**If you don't have transparency into how your data is coded, you have no way of knowing whether your data is accurate.**

For one client, when asked to test the difference in sentiment coding between 4 vendors, we took coverage of a single pharmaceutical company during a one-month period in April 2014. Results varied as much as 51 percentage points -- from 7% positive to 58% positive. Negatives varied from 0.32% negative to 26% negative. Against human coders, the average agreement was 50%. This is why you should start any measurement project by getting all vendors and agencies to complete the transparency table.

# Testing Validity of Criteria



# #6 Impact & Value

- **Impact**: The effect of a social media campaign, program, or effort on the target audience.
- **Value**: The impact expressed in either cost savings or revenue incurred.
- **ROI** (Return on Investment): A financial performance measure. To calculate ROI, the benefit (return) of an investment is divided by the cost of the investment; the result is expressed as a percentage or a ratio.
- Any measure of Impact & Value must be tied to the goals and objectives for your organization, brand, or program.
- Assessing the value and impact of a campaign cannot be reduced to a simple formula that applies equally to consumer, B2B, and/or non-profit organizations.

# #6 Impact & Value (continued)

- Impact and value will always be dependent on client objectives.
- Need to define outcomes in advance – will likely span multiple business goals, especially for social (crosses disciplines).
- ROI should be strictly limited to measurable financial impact; “total value” can be used for financial and non-financial impact combination.
- Value can be calculated in positive returns (sales, reputation, etc.) or avoided negative returns (risk mitigated, costs avoided).
- Key Performance Indicators (KPIs) and balanced scorecards are helpful to connect social media impact to business results/language.

# 6 Steps to Standards-Compliant Measurement

**Step 1: Define the goal**
What outcomes is this strategy or tactic going to achieve?
What are your measurable objectives?

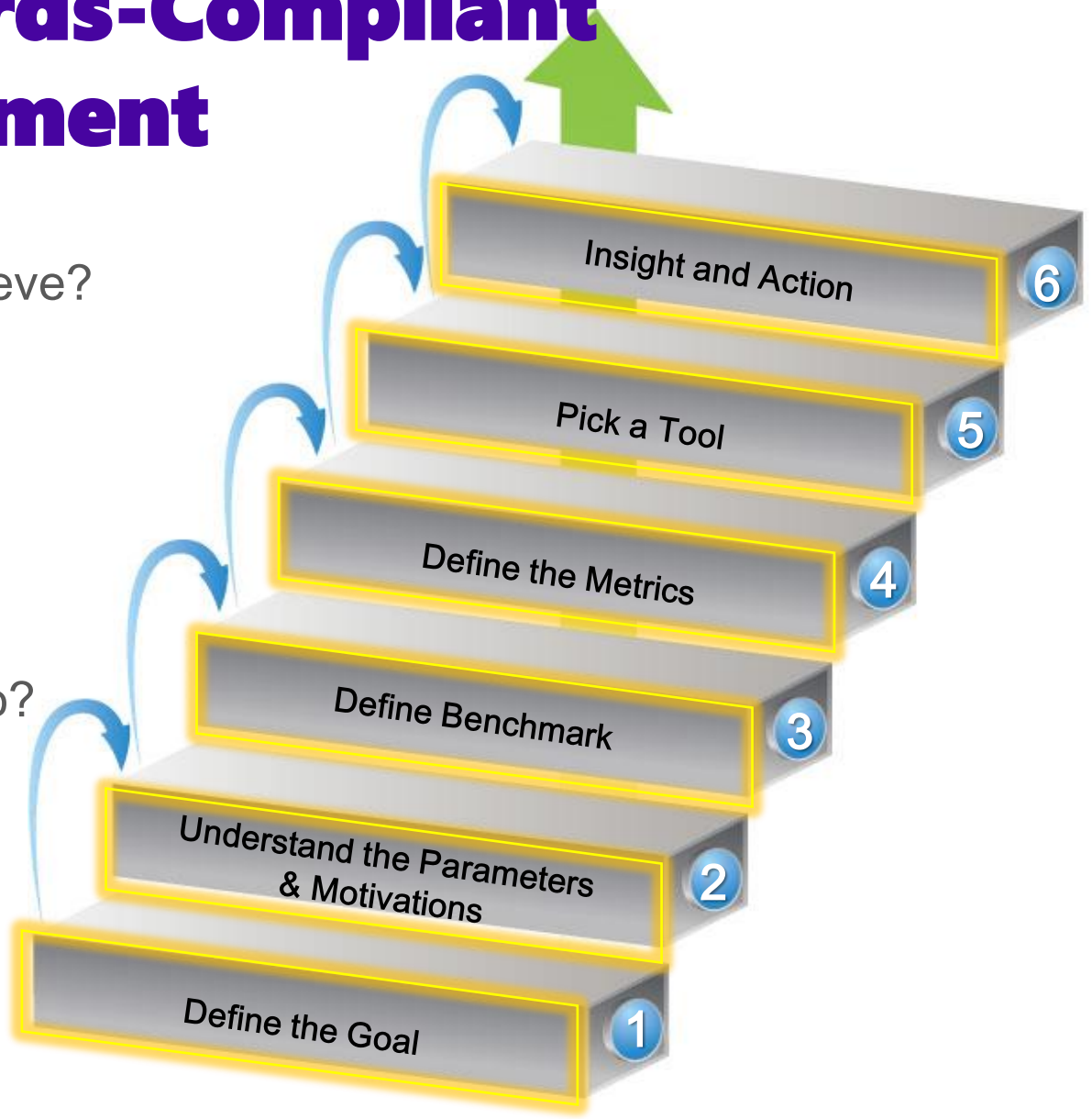
**Step 2: Define the parameters**
Who are you are trying to reach? How do your efforts connect with those audiences to achieve the goal?

**Step 3: Define your benchmarks**
Who or what are you going to compare your results to?

**Step 4: Define your metrics**
What are the indicators to judge your progress?

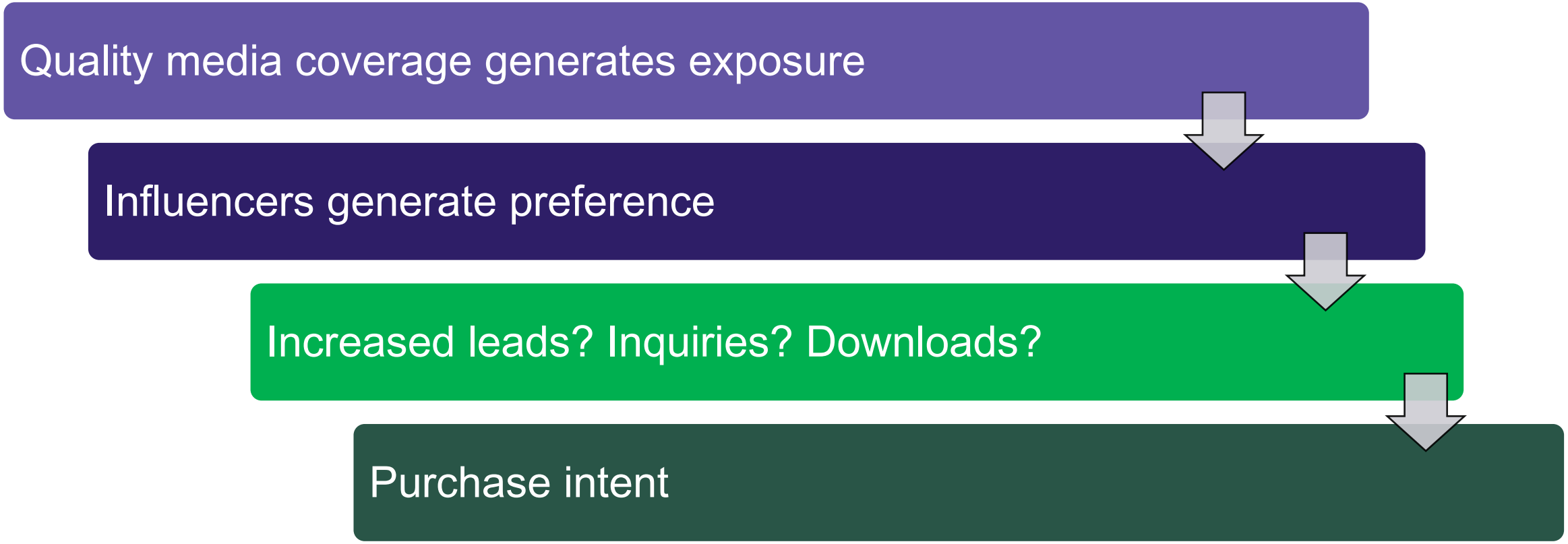
**Step 5: Pick your data collection tool**

**Step 6: Analyze your data**
Turn it into action, measure again



# Definitions of "Success"

- What's the path to purchase?



# Step 1: Define Goal (and action & metric)

| Goal | Action | Activity Metric | Outcome Metric |
|---|---|---|---|
| Increase in donations | Create social campaigns that increase awareness & likelihood to give | % of quality media coverage and social media conversations | % increase in donations |
| Increase in % of new donors | Use social media to build network | % increase in awareness<br>% increase in Net Promoter Score | % increase in % of new donors |

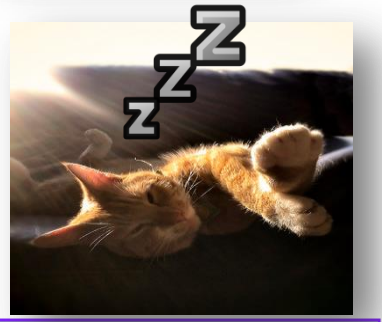
# Step 2: Understand the parameters

- What are management's priorities?
- Who are you are trying to reach?
- How do your efforts connect with those audiences to achieve the goal?
- What influences their decisions?
- What's important to them?
- What makes them act?

**Goal**: Get the cat to stop howling

**Strategy**: Buy cat food

**Options**: Local? Cheap? Convenient?

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# Know who matters

- Who are the priority stakeholders?
- Where do they get information?
- What keeps them up at night?
- What are they seeing about you now?
- What are they seeing about the competition?
- What do you want them to know?

# Know what matters

- What problem were you hired to solve?
- How does leadership perceive your contribution?
- What are the priority/goals for the organization?
- How are you supporting or contributing to those priorities?
- What is your sales cycle?
- What channels, distribution points are involved?
- Who will see/use the report?

# Step 3: Establish benchmarks

- Measurement is a comparative tool, so results must be put into context.
- Past performance over time.
- Think 3.
- Whatever keeps your boss awake at night.

# Step 4: Pick your Key Metrics

The Perfect Key Metrics

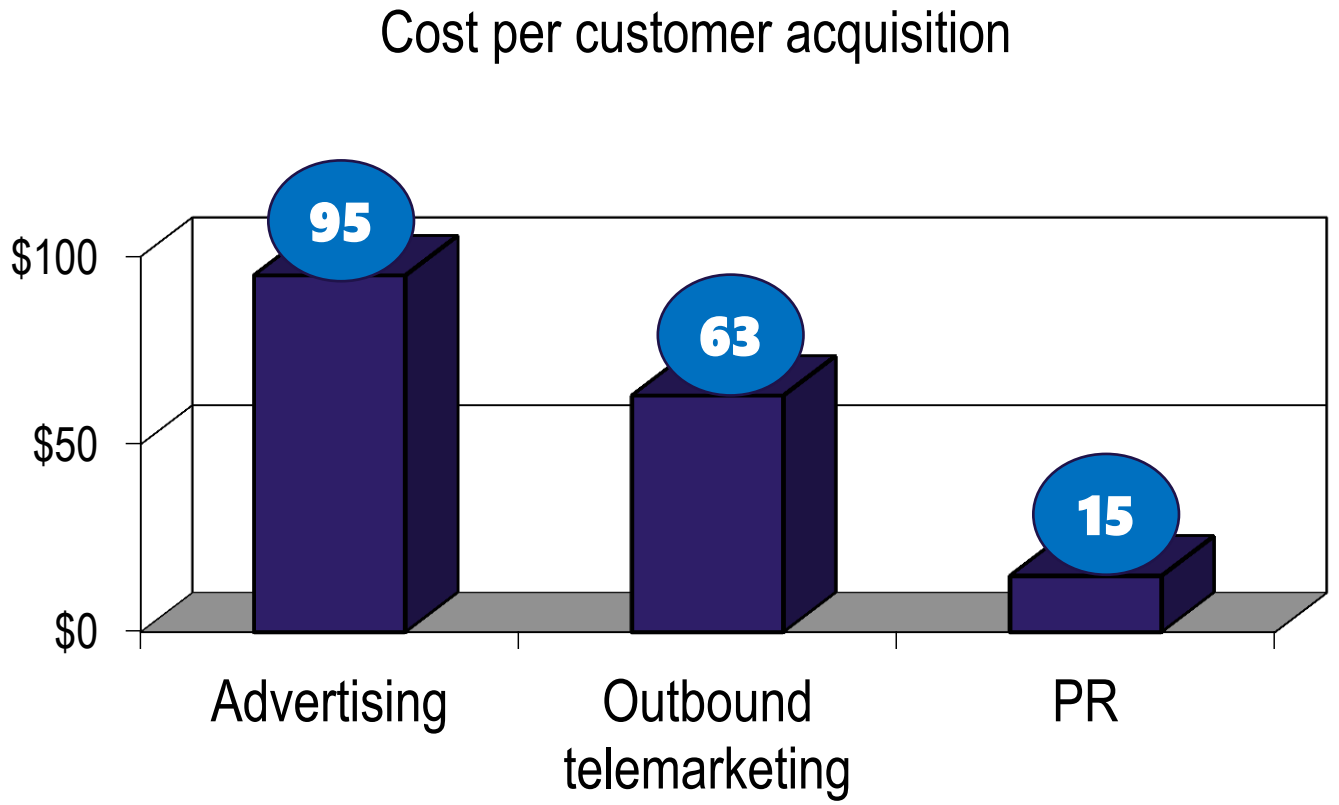
- Is actionable.
- Is there when you need it.
- Continuously improves your processes & gets you where you want to go.
- You become what you measure, so pick your metrics carefully.

# Define How PR fits into a Marketing Mix Model

- PR delivers measurable impact on:
  - Positioning
  - Awareness
  - Preference
  - Sales/revenue
  - Market share
  - Web traffic
- When factored in to marketing mix modeling, PR delivers significantly higher value.

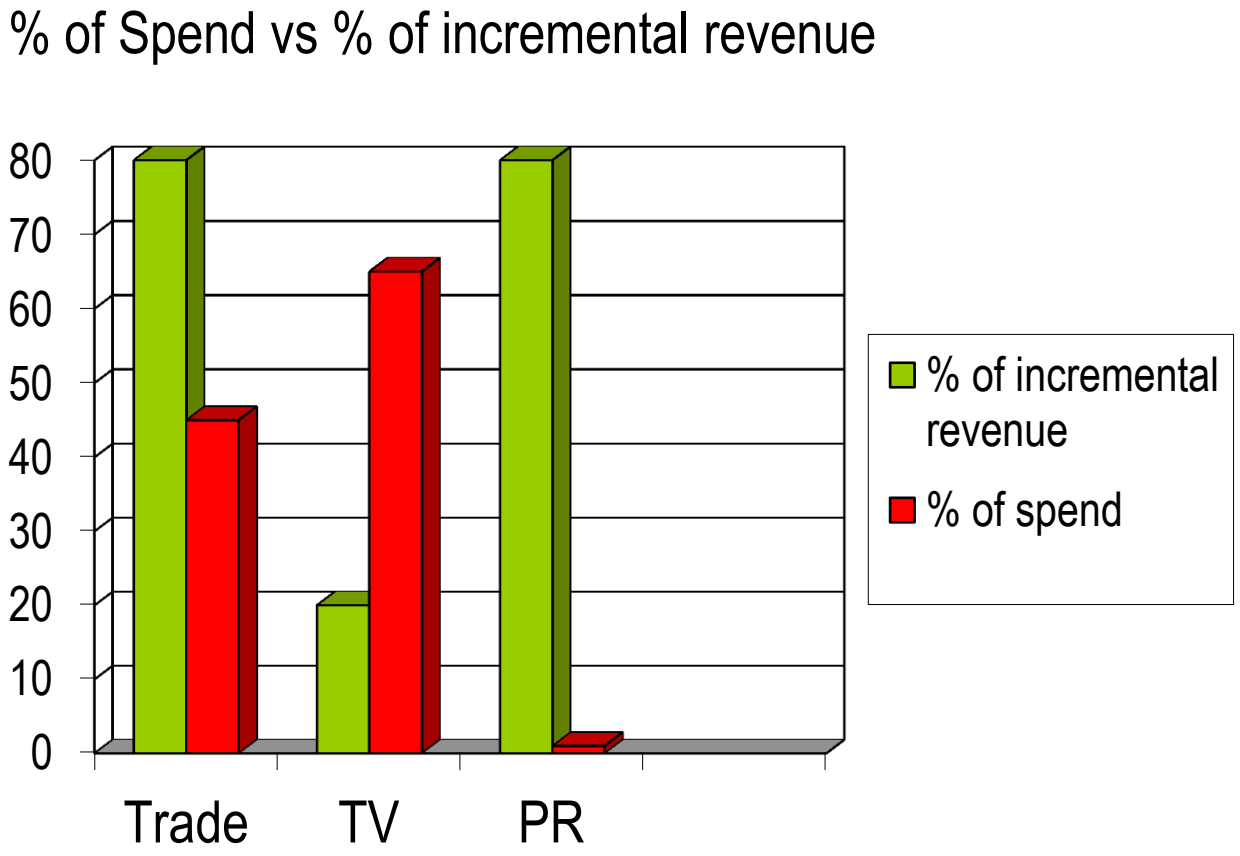
# Proof of PR's impact on sales

- P&G found that PR drives sales.
- Three of the six products showed PR with the highest ROI of any marketing tactic.
- Overall PR delivered a 275% ROI.
- AT&T found that PR delivered customers at a fraction of the cost.

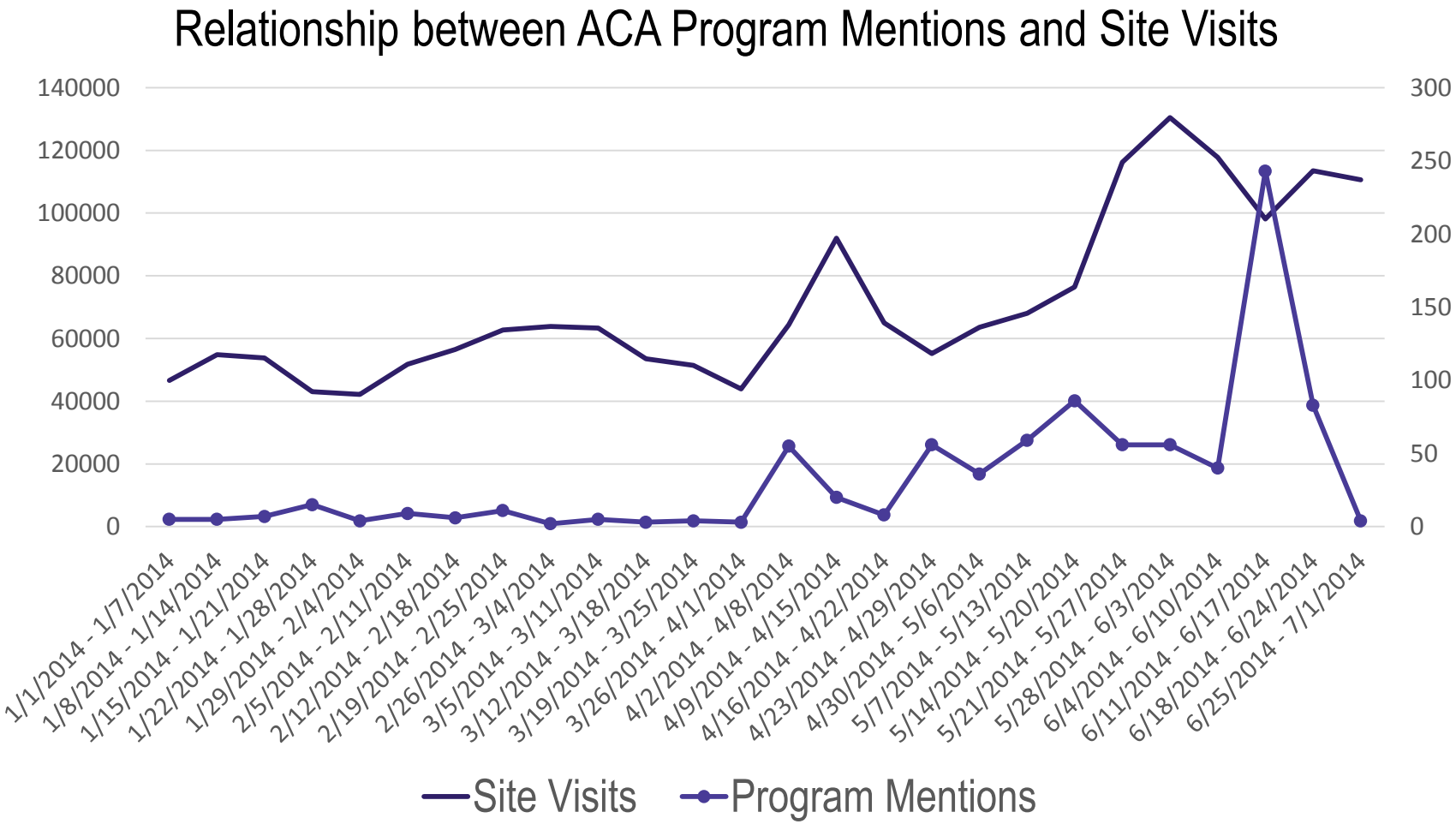


# PR delivers more results for less money

- Miller discovered that PR campaigns generate 4% of incremental sales compared to 17.3% of incremental sales for TV.
- However, PR delivered that 4% for less than 1% of the budget.



# When ACA programs received media coverage, traffic followed



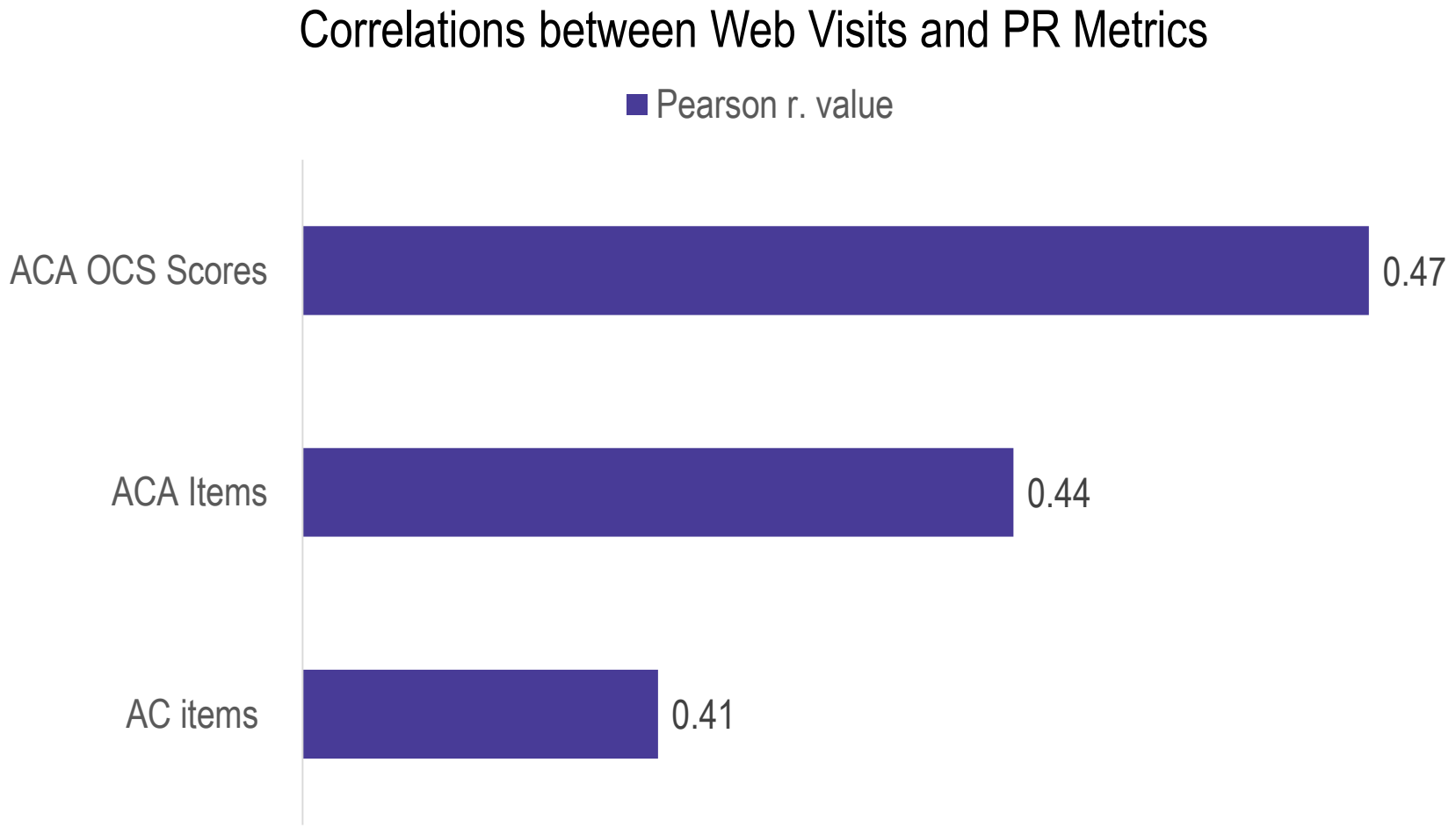
# Step 5: Selecting a measurement tool

| Objective | KBI | Tool |
|---|---|---|
| Increase message communications | Increase percent of items containing one or more messages | Media Content Analysis (CyberAlert, Prime, Carma) |
| Increase awareness/ preference | % of audience preferring your brand to the competition | Survey Monkey, Survata, Quantcast |
| Engage marketplace | % increase in engagement on website and/or social sites | Unmetric, Simply Measured, Google Analytics, Site Catalyst, Network Analysis |

# Crafting an Optimal Quality Score (OCS)

| Criteria | Result | Score | Result | Score |
|---|---|---|---|---|
| Tonality | Favorable | +3 | Unfavorable | -3 |
| Messaging | Yes | +3 | No | -1 |
| Quotes | Yes | +1 | No | -2 |
| Dominance | Dominant | +1 | Not Dominant -or- Unfavorable & Dominant | -1 |
| Visibility | High Visibility | +2 | Low Visibility -or- Unfavorable High Visibility | -3 |
| Final Score | | +10 | | -10 |

# ACA programs drive higher OCS scores, which correlate highly with web visits

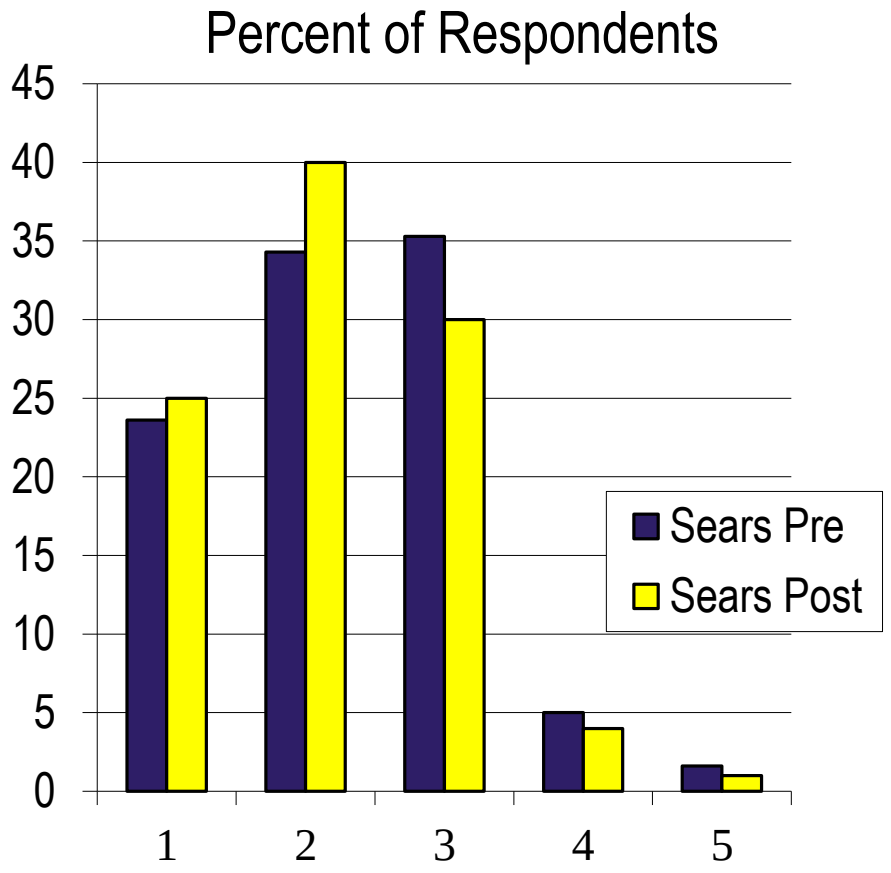


# Step 6: Be Data Informed, not Data Driven

- Rank order results from worst to best
- Ask “So What?” at least three times.
- Put your data into an overall framework consistent with C-Suite expectations.
- Find your “Data Geek.”
- Compare to last month, last quarter, 13-month average.

# "Sears is a high quality company."

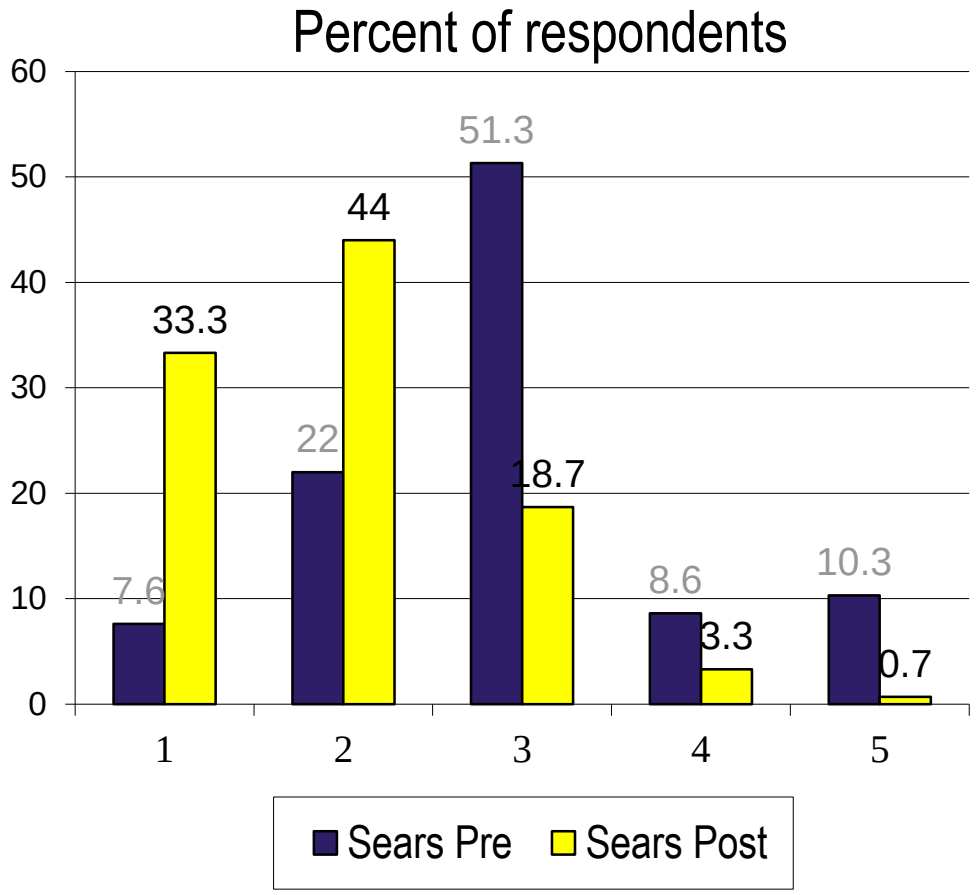
- After the PR placement on the Oprah show, a positive shift for the quality perception of Sears was seen among the Oprah audience.
  - 65% agree with a high quality statement (up from 58%)
  - The positive shift came from all rating levels




1 = Agree Completely. 5 = Disagree Completely

# "Sears does good things for the community and its environment."

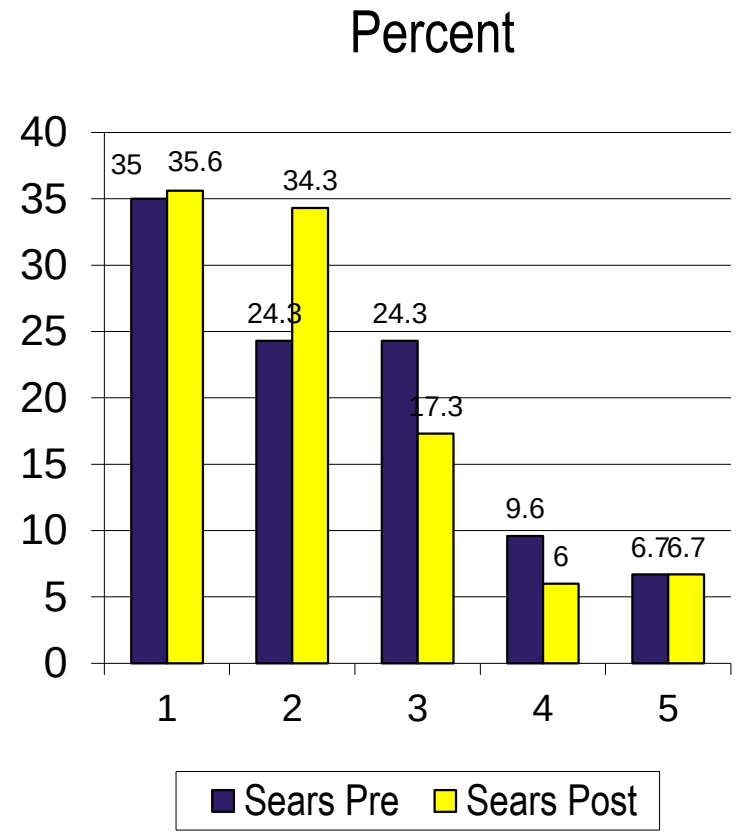
- After the Oprah segment, there was a huge shift towards believing that Sears does good things for the community and environment.
  - Almost a **five-fold** increase in the number of respondents agreeing completely with this statement




Scale: 1 = Agree Completely. 5 = Disagree Completely

# "I plan to shop at Sears for the holidays."

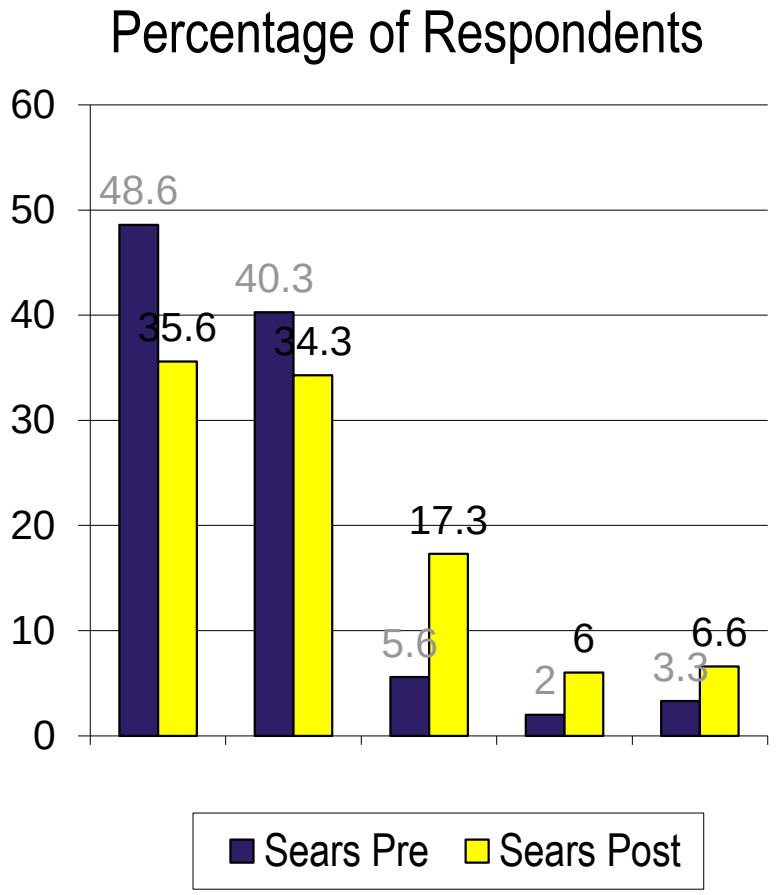
- The Oprah PR placement provided the additional incentive needed to move some viewers from a neutral position to a positive intent to shop at Sears.
  - The positive side of the intent to shop increased to 70% (from 59%)




Scale: 1 = Agree Completely. 5 = Disagree Completely

# …estimate what you'll spend at Sears during this holiday season…

- In addition to a positive shift in the number of people saying they planned on shopping at Sears, spending levels also increased.
  - An increase of +39% per shopper in the amount they estimate they'll spend at Sears



# Measuring ROI on the event

- This shift in attitude led to a planned spending increase of $40 million.
- If discounted by two-thirds to account for intentions that never come to fruition, the return can be calculated at $13 million.
- Add the cost of the merchandise, the time spent arranging with the producers and associated costs.
- ROI can then be calculated:

$$\text{ROI} = \frac{(\text{GAIN FROM INVESTMENT} - \text{COST OF INVESTMENT})}{\text{COST OF INVESTMENT}}$$

# Fashion Footwear and NYT

- January feature placement in *The New York Times* -- New York/New Jersey edition.
- What was the impact in that market vs. a control market and vs. national?

NEW YORK UP CLOSE

The Look Says Blahnik. The Label Is Sears.

Diane Clehane, a self-described "shoe freak," has 200 pairs of shoes, 20 of them from Sears. At left, some Sears shoe styles with high-fashion touches.

*January 23rd, 2000*

# Footwear Conclusions

- A single placement in a credible publication made a dramatic difference in sales compared to both national and comparable market.
- The only variable that changed that week was the New York Times placement.
- Translated into measurable dollars.
- Cost of placement vs. incremental revenue increase gives a true ROI.

# 10 Steps to Perfect Measurement

1. First get consensus on how PR/social media contributes to your business
2. Define success for PR/Communications
3. Draft metrics that reflect those goals and expectations
4. Produce a bespoke “Standards Document” telling everyone, including agencies and foreign offices how to report
5. Produce a dashboard with the best data you can find and point out the gaps
6. Put on your bullet proof vest & explain to EVERYONE
7. Produce the first report
8. Repeat Step 6 as often as necessary
9. Draw conclusions, make decisions
10. Take it to the board

# Thank You!

- For more information on measurement go to: PainePublishing.com
  - For instructional guides and tutorials, check out our Measurement Mall
- If interested in subscribing to our newsletter for communications professionals, *The Measurement Advisor*, try 30 days for free
- Email Katie Paine: measurementqueen@gmail.com
- Or give her a ring: 1-603-682-0735

**To take what you've just learned about the Barcelona Principles to the next step, we recommend The Barcelona Principles Compliance Tutorial!**

**Connect with us too!**