



How to Be a Measurement Sherpa: The Quick Guide



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Introduction

Every organization needs a Measurement Sherpa to help navigate the maze that is today's world of measurement. What's a Measurement Sherpa, you ask? A Measurement Sherpa:

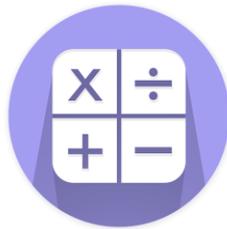
- Knows the latest measurement standards and stays on top of new developments.
- Deals with all those measurement vendors knocking at your door, and knows the difference between their BS and real value.
- Patiently explains the difference between correlation and causality to whoever asks.
- Doesn't let anyone use the term "ROI" unless they have all the requisite data. (Instead, helps them calculate cost-effectiveness and cost-benefit ratios.)
- Understands the difference between valid and invalid metrics, and knows how to fix the bad ones.
- Plays the hard-nosed skeptic with vendors, but has a velvet touch with other departments.
- Knows how to get answers when no one else does.
- Knows that perfection is not possible, and knows when good enough will do.
- Knows when a full-blown research project is needed, but can also take a fast dive into an Excel spreadsheet to find enough data to shut people up.
- Knows the difference between the right answer and a fast answer.

Essentially, Measurement Sherpas love data. They gather it, interrogate it, gain insight from it, and present it in a way that answers questions and solves problems. *How to Be a Measurement Sherpa: The Quick Guide* focuses on critical skills a Measurement Sherpa must have to survive (and thrive) in today's measurement world.

Each skill will be examined in-depth so you can quickly master what you need to know in order to succeed individually and as a valued member of your organization. Here's an overview of the three skills we will be focusing on:

1. How to budget for a measurement project
2. How to manage an RFP process
3. How to clean up dirty data and fix common errors.

Let's get started...



Skill One: How to budget for a measurement project

Over the years, I've developed a 4-step system for figuring out a proper budget for a measurement project:

Step 1: Determine a reasonable amount of money to spend.

For years the experts, including myself, have told you to spend 10% of your communication budget figuring out whether the other 90% is working. But that doesn't really tell you how to allocate that 10%, nor does it cover all scenarios.

So here is a better approach: Look at the campaign or program you're trying to measure. Now look at the total budget for it, factor in the importance it has on the bottom line of the organization, and make an educated guess as to what is reasonable to spend on measuring the success of that campaign or program.

Look at it this way: If you're spending \$500,000 for an incremental lift in sales of a product that costs \$100,000, then you'll be a lot more willing to invest 10% of the budget on measurement than if you're spending \$25,000 promoting a product that costs \$10. So use your best judgment and your knowledge of the organization or your client. Go as big as you think you can and still have it make business sense.

Step 2: Determine what you need to measure.

If you want to measure awareness, you'll need to do some survey research. If you are looking for a simple consumer survey and have six questions or fewer, you can buy responses from Survata for \$1 per completed response.

If you need to test awareness among a narrow demographic or professional group, figure a minimum of \$100 per completed survey. How many completed surveys does your budget enable you to reach? If it's less than 100, then surveys aren't the way to go.

If you want to measure message penetration, subtleties in positioning, or nuanced sentiment, you'll need human coding. Figure around \$4 per item for coding.

If you're tracking audience response and/or engagement, you can probably get away with Google Analytics and maybe additional help from something like Sprout Social at \$50 per month. Or, if you want to look at a broad spectrum of social channels, then try Simply Measured for \$500 per month.

Step 3: Allocate the budget.

Ideally you'd want to measure everything. But if you have a tight budget, you may be forced to pick one aspect to measure. For media analysis, or anything that demands human coding, there's a simple formula I recommend.

Let's assume you're trying to budget for an annual measurement program. You've decided that a reasonable budget is \$50,000. You know you're going to need quarterly reports. A written analysis report costs a minimum of \$2,500. Thus, four reports a year = \$10,000.

Collecting the content will cost you a minimum of \$4,000 a year. If you're like most organizations, with a lot of search terms and a lot of publications, assume it will cost you a minimum of \$20,000. So now, there's \$20,000 left in your budget for reading and coding. Assume an industry average of around \$4 a clip. \$20,000 divided by \$4 means that you can code 5,000 clips per year:

$$\frac{\$20,000}{\$4} = 5,000 \text{ clips per year (or 417 clips per month)}$$

Step 4: Make tough decisions as necessary.

If your calculated clips per month sounds like a reasonable number, then you're good to go! If it's only a fraction of what you envisioned, then you have a few choices to help you stay within the budget:

- Elect to do a random sample. Typically you would sample by media outlet type or channel. The downside of random sampling is that you can't use real numbers, only percentages. This is important to remember when reporting results.
- Reduce your target media outlets to only those that really influence your target audience.
- If you're planning to measure the competition, reduce the number of competitors.



Skill Two: How to manage an RFP process

One of the projects that a Measurement Sherpa needs to be able to handle is managing a Request for Proposals (RFP) process. In an ideal world, every search for a measurement tool would begin with a detailed planning exercise, in which goals and objectives are written down, requirements are agreed upon by everyone, and criteria for success are clear and well-defined. Unfortunately, most RFP processes start with a call from your incumbent vendor reminding you that the annual contract is up, and a vague threat that if you don't renew right now your data will be gone. Or worse, someone in senior management gets so frustrated with the existing service that they fire them and order a vendor review. Here are the steps to follow when managing the RFP process:

Step 1: Get your ducks in a row and agree on definitions.

Start the RFP process by arranging a meeting of everyone who uses or wants to use the monitoring or measurement system in question.

Get consensus on the types of media to be monitored, the search terms, the specific top tier publications, the metrics you want to see, and how much money you want to spend (see “Skill One: How to budget for a measurement project”).

For guidance about what needs addressing in this meeting, here are a dozen questions to answer before moving on in the process:

- Are my messages and issues too nuanced for a computer?
- Do I get sufficient volume to warrant automated coding?
- Do I need share of voice numbers, if so what competitors are we including?
- Do I need to collect coverage in foreign languages or countries?
- What are our key media outlets that absolutely positively must be tracked?
- Do I need to have humans code a random sample?
 - Tip: Computers do a really good job of putting words into buckets. Any good Natural Language Processing system can go through the torrent, pull out mentions of your brand, and put them into a database complete with the date of the mention, the source, the author, and the title. Some, like NetBase, achieve pretty accurate results with basic sentiment. Beyond that, for analysis of sentiment, messaging, positioning, etc., we rely on humans.
- How will you define positive? Negative?
- Do you need to track messaging and positioning?
- Is the visibility of your brand (where it appears in a story) important?
- Do you need to know if a link back to your website or blog is included in the story?
- Who should see the report and how often?
- Are photos and visuals important to track?

Step 2: Create your lists of vendors.

First of all, if your boss says that you absolutely positively need actual print coverage, you will have to talk to a vendor like BurrellesLuce or CyberAlert that can get it. Most media monitoring and measurement companies these days only collect online media. If you make the smart

choice to use the same vendor for both traditional media and social media, make sure they're good at both. (Many of the social listening tools offer it as an add-on but they may not have all your key publications. CyberAlert and Prime Research are two that do both well. If video is a requirement, most monitoring companies rely on the websites of broadcast outlets for the data. If actual video is required (as opposed to a link to the broadcast site), there's TV Eyes and Critical Mention.

The availability of human coding will shrink your list still further. Most automated systems like NetBase, TrendKite, Talkwalker, and Sysomos don't offer human screening. Basic traditional monitoring companies like Meltwater do not offer human coding either. If you need human coding, PRIME Research and CyberAlert are good choices.

Step 3: Screen the vendors.

First of all, make sure you have clearly defined criteria by which to judge whatever vendors you're considering. Those criteria should be agreed upon by the team that will be using the system.

When screening vendors, you'll want to compare apple to apples, or at least apples to pears. Make sure you understand the full capabilities of whatever vendor you're considering. Too often I hear of organizations comparing apples to goats (i.e., the capabilities between vendors are so completely different there is no way to compare them). Most vendors will provide you with a trial period to test the data. Take advantage of it. But make sure you're testing against the criteria you've specified.

Step 4: Make your decision.

Finally, after all the trials, presentations, and proposals are submitted, you need a way of making a decision. A convenient tool for this is Paine Publishing's Vendor Evaluation Form. ([Click here to download a copy.](#)) Just follow the instructions and as you fill it out, the spreadsheet will automatically make the calculations for you. Whichever vendor gets the highest score is the winner!

Step 5: Hagggle over the price.

Make sure that the full parameters are spelled out to the vendor before they give a final price quote to you or to the purchasing department. Get clarity over what happens if the scope begins to creep.

Step 6: Deliver the good news (or bad news).

The final step in the process is to notify all the vendors. I've been on the receiving end of many of these phone calls, hearing both the good and the bad news. Here's how to ensure you always get the best results:

- When you call the winning vendor: Have your calendar in front of you. Set up a meeting within a week to have the handoff between the salesperson and the people who will actually work on your account. The sooner your team gets to know them, the smoother things will go.
- When you call the losing vendor(s): Explain your decision and your rationale. No vendor wants to lose and not learn anything from it, and you shouldn't want that either. Your feedback will presumably make the vendor a better provider in the future. And you never know when you might need another one.



Skill Three: How to clean up dirty data & fix errors

Dirty data is the doom of any measurement project. It's the difference between vital insight and months of wasted effort. And here's the media monitoring industry's dirty little secret: You can't trust their data. Nope. They'll feed you gibberish and cash your check with a smile. Not that they are malicious, they just can't take the time or effort to clean your precious data like you can.

The good news is that there are specific efforts you can make when you collect, code, and analyze your data to ensure that it is as clean as possible. The three biggest culprits that will compromise your data are: Bad Collection, Bad Content, and Bad Numbers. Follow the 5 steps below to tidy up your data and your measurement will be off to a clean start.

Step 1: Filter out the junk, duplicates, and irrelevant items.

Pretty much all dirty data starts with a collection process that pulls in too much of what you don't want. That means that either the search strings are too broad or too narrow, there aren't adequate spam filters, or there is an inadequate process for removing duplicate and irrelevant items:

- Search Strings: The fix is to budget for adequate time and dollars to test your search strings, dig into the results, modify them, test them again, and tweak as necessary. This can be tricky and time-consuming: For complicated programs it is not unusual to have upwards of 1000 terms within a single search string
- Spam: Use your "find" function in Excel to find spam (like Viagra and Vioxx). In one database for a restaurant we searched for "Viagra" and eliminated about 25% of the mentions! Look for calendar listings, weddings, police blotter notifications, and anything with similar but inappropriate terms. For example, we did a search for Johnson & Johnson and turned up a remarkably revealing discussion of sexual innuendo and puns that had very little to do with the products the famous medical supply company provides.
 - Tip: If Twitter is part of your data, look for and eliminate Twitter handles of people with similar names to your brand or abbreviations the same as your stock ticker symbol.
- Duplicates: The fastest way to find duplicates is to use the "Sort" function in Excel. Sort on date, outlet name, and title or body text and you'll be surprised at how many items will have the same date, title and outlet. Those are duplicates that should be removed.
 - Tip: Go to "Data" in Excel and click on "Remove duplicates." You can select the appropriate columns. I typically do it on the item URLs.
- Examples of irrelevant items:
 - Boilerplates: Press releases can be picked up because the organization's boilerplate says "...has worked with clients such as..." Fix: Do a search for "PRNEWSWIRE," "PRWEB" or just "WIRE," and you'll be able to identify the press release.

- Underwriting credits: Many of broadcast clipping services now provide radio, including transcripts from National Public Radio (NPR) as well as individual shows like Marketplace and Living on Earth. Unfortunately, they haven't figured out that those nice message-rich statements at the end of the broadcast are in fact paid underwriting credits. They should not count as "earned" media.
- Foreign interference: Mentions from the UK, Germany, Australia, Canada, France, and India in supposedly "US Only" clips. Fix: Look for URL domains like .dk, .fr, .ca, etc., and remove.
- Paid bloggers: Any blog that has on its home page, "I was paid or compensated to write this" is not earned media. Sort all blogs by frequency and tone. If you get one blogger that is consistently positive and posts regularly, check him or her out. I'm not saying they are all paid, but you'll want to double check.

Step 2: Make sure you are getting the content you do want.

The other side of the bad data collection coin is failing to pull in articles that you **do** want. After three decades in the business, I can tell you that you will never get 100% of the items you want. There's just too much stuff out there to guarantee that you'll get everything.

But, frankly, "getting everything" doesn't matter. What matters are those stories that are going to reach your target audience and get them to do something: buy your product, change their mind, donate, volunteer, or in some other way benefit your organization. For most people, that means on-message, on-topic stories that appear in key media. So check your data to make sure you are bringing those in. If you can't find them, go back to your search string and revise it. Then check and revise again and again, until you get the stories you're looking for.

For the most important publications you should be able to determine what a reasonable amount of coverage they're going to give you every month or every quarter. So one of the first things you should look for is an abnormal drop in coverage from any one media outlet. For a large public company, it's reasonable to expect pretty regular coverage at least once a quarter in major business media. If there's none, that should send up a red flag. Double check against a Google News search to make sure that something didn't happen to the feed for that publication.

Tip: It often happens that you know that an article appeared in April, but it is listed in your June results. Fix that by checking to make sure whether your vendor is reporting “day of publication” or “day of collection.”

Step 3: Clean up your coding.

Now let’s assume you’ve refined your content collection, and now have reasonable confidence that the data you want is actually somewhere in your database or Excel file. Now you need to insure that it is coded correctly.

- Check sentiment: If you are using an automated computer-generated sentiment system, the first thing you need to do is to look at a representative sample of the data (about 10%) and see if you agree with how it’s been coded. Ideally you’d have two independent coders review it and then conduct a [Krippendorff’s alpha intercoder reliability test](#) to ensure accuracy. If you don’t have the time or the resources to do a structured test, at least review the coding yourself. If you don’t agree with 80% of how it’s coded, you will want to go back to the system or the vendor and modify the words the sentiment engine is using to determine positive, negative, and neutral.
- Don’t get stuck in neutral: Chances are that an automated system will find an overwhelming amount of neutral items, since neutral seems to be the default sentiment. Most good systems will learn from any changes you make to it. So if the system allows you to, change the sentiment of the items you don’t agree with. With luck, the next time you run the results you’ll have a higher percentage of accuracy.
- Tune up your tagging: The other source of content errors is bad tagging. Most collection systems use a tagging process to bucket items into subject categories. In theory it’s a great system because a computer can easily find a specific word or “tag.” Too often, however, what the computer thinks is the right tag may not be what you think is the right category. Again, getting the tagging correct is an iterative process that may take several tries to get right.

Step 4: Check your math.

Ultimately, most dashboards come down to numbers, which means you really need to check the math. Dirty data frequently includes made up “impression” counts and/or multipliers. If you think you have the wrong circulation/OTS numbers for...

- Online data: First check the URL. Is your system reporting for all of Yahoo, or the specific blog in which your news appeared? This happens with Facebook data all the time. The good news is that Twitter actually tells you the number of followers an individual author has. So why do some organizations report the “circulation” for Twitter as 42 million? Because it’s easier than actually tying the tweet to the person/account who tweeted it.
- Traditional media: Do a common sense check. Put the data into an Excel spreadsheet and sort by circulation (OTS) largest to smallest. Go to the URL of the top 10 items with the biggest circulation. Are they for real?
- Online news circulation: For online news circulation, if you use the free version of Compete you will only get the root URL, not the subdomains. So check carefully that the URL corresponds to where the item actually ran.

Overblown impressions are relatively easy to spot. Bad algorithms or inaccurate correlations are a lot harder to find. Frequently, you can spot them just by noticing when you start scratching your head or yell out “WTF!” If you’ve cleaned up your data to this point in the process, but your analysis numbers don’t make sense, then chances are good that there’s a bad calculation in there somewhere. Do a gut check, drill down into the data, and see why the numbers are giving you aggravation.

Step 5: Abide by measurement standards

The organizations that use industry standards, the more the data and analysis will improve across our entire industry. In response to the Barcelona Principles, an agreement forged in 2010 among leading providers, agencies and clients, industry associations came together to create standards for best practices in PR and social media measurement.

Here are what the 7 Barcelona Principles state:

- 1) Goal Setting and Measurement are Fundamental to Communication and Public Relations
- 2) Measuring Communication Outcomes is Recommended Versus Only Measuring Outputs
- 3) The Effect on Organizational Performance Can and Should Be Measured Where Possible
- 4) Measurement and Evaluation Require Both Qualitative and Quantitative Methods
- 5) AVEs are not the Value of Communication

6) Social Media Can and Should be Measured Consistently with Other Media Channels

7) Measurement and Evaluation Should be Transparent, Consistent and Valid

Immediately following their publication, [The Coalition for PR Research Standards](#) was formed to establish guidelines and best practices for traditional media. Shortly thereafter [The Conclave for Social Media Measurement Standards](#) was established to do the same for social media measurement.

To view all of the standards, check out Paine Publishing's "Standards Central" by visiting: <http://painepublishing.com/standards-central-2>

Wait! One more thing...

If you want even more information and tools to help you be the best Measurement Sherpa you can be, check out our full-length digital tutorial, [Measurement Sherpa's Essentials Tutorial](#). Use coupon code **sherpasvT25** to receive 25% off your purchase!