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The Complete Guide to Integrated Measurement

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Introduction

It recently occurred to me that perhaps the biggest trend for the future of measurement is integrated communications measurement: the combination of all these various forms of communications into unified measurement systems.

Yes, anyone who has read anything I've written in the last five years knows that I've been urging organizations to consider integrated measurement systems. But more and more I'm seeing organizations actually implement them.

This ebook is divided into the following chapters:

1. **Reasons why integrated measurement will make your life easier**
2. **How to design an integrated dashboard in 7 steps**
3. **A checklist to help you create your own integrated measurement system**
4. **True tales of integrated measurement**

Let's get started…

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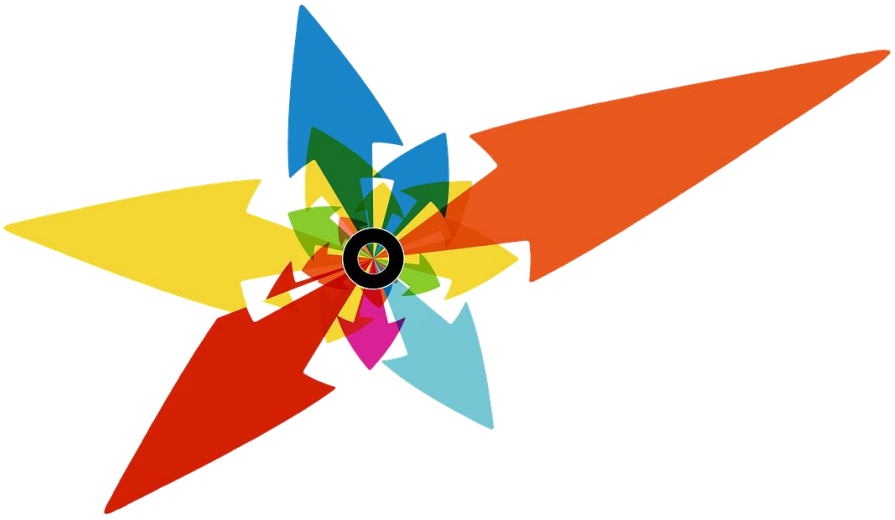
Chapter One
Reasons Why Integrated Measurement Will Make Your Life Easier



"Integrated communications measurement" does not mean reducing all your measurement reports to mice-sized type so they fit on one page. We're talking about measuring your communications program as a whole—assessing the impact of all the individual components together. This will probably require drill-downs into individual function results, but the point is that the measurement process is conceived, planned, and undertaken as a whole.

Why integrate your communications measurement? The advantages of this approach are clear, as revealed in the recent Conference Board report "Unlocking the Value of Integrated Corporate Communications and Marketing." (For a summary of that report, see the article "Integrating Communications and Marketing: The Path to Digital Transformation.")

1. It puts your stakeholders first.

When we're in the trenches doing day-to-day communications projects, it's easy to focus on the to-do list and the activities we undertake, which is when we lose track of the ultimate goals and the outcomes we're trying to accomplish. We concentrate on pleasing our internal customers, co-workers, bosses, and clients that are in our face on a daily basis.

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But what really matters are the key target audiences and stakeholders with whom we're trying to communicate. When we integrate communications functions, we see a bigger picture. We are able to look at not just how much we are reaching the target audience, but how we are reaching them most effectively.

2. It puts everyone in corporate communications on the same page in terms of over-arching goals.

One dashboard with everything on it ensures that there is clarity and consistency about how the individual campaigns, initiatives, and projects are measured. Sure, there will be specific objectives and maybe even different messages for different projects. But ultimately having one integrated dashboard means that everyone is keeping a bigger picture goal in mind.

3. It provides consistency no matter who's in charge.

Management in corporate communications can be fluid these days. But with consistent goals, objectives, and metrics, everyone can stay on track no matter what chaos ensues among the top ranks. When everyone is working towards improving the same metrics, they stay focused on outcomes, not internal politics.

4. It improves internal communications and teamwork.

Dashboards aren't granite monuments that you put in place and ignore. They contain the stories, case studies, and the communications teams efforts for the month or quarter that's being reported. As such, integrated dashboards provide a reason for the communications group to sit down and actually communicate about what worked and what didn't. More importantly they provide an opportunity to collectively brainstorm about how to improve your processes.

5. It collapses silos.

One of the biggest problems in today's multi-media communications environment is siloed thinking. Too often people don't share goals or messages, and each person or department

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works towards individual goals. Later, everyone claims attribution for success without considering the influence of other disciplines.

Integrating all the efforts into a single dashboard requires sharing data and, ultimately, learning how different disciplines contribute to the communications goals.

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Chapter Two
How to Design an Integrated Dashboard in 7 Steps

Integrating paid, earned, owned, and shared (PESO) communications efforts with marketing is a trend whose time has come. As organizations increasingly focus on outcomes rather than activities, more and more organizations are integrating the metrics for their communications and marketing teams into a single measurement dashboard.

Here's how to design an integrated dashboard in 7 steps:

Step 1: Define your goals…What does leadership expect your integrated communications and marketing team to achieve?

When you set out to measure any communications program, tactic, or campaign, the first thing you need to do is ask: To what end? What is the desired return? What's the goal? What problem will this program solve?

When you're doing a major measurement program to integrate various communications functions under a single set of metrics, it's even more important to answer this question as broadly as possible. What you are trying to ascertain is the expectations that senior leadership has from the integrated communications function. There are generally several, but try to keep them to no more than five.

While the specific answers will vary depending on your organization's mission, programs, intent for social media, and maturity of practice, the outcomes that you will be measuring will probably fall into one or more of 3 categories:

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Category 1: Changing perceptions of your brand or reputation

- Changes in perceptions or awareness of your brand or mission
- Changes in positioning of your brand or mission
- Communication of key messages about your brand or mission

Category 2: Improving relationships with your stakeholders

- Improvement in or establishment of relationships
- Changes in the health and strength of your relationships with stakeholders
- Increase the size and frequency of the relationships with key stakeholders

Category 3: Increasing desired behaviors of customers or members

- Increases in requests for information
- Increases in qualified leads
- Increases in donations/volunteers/participation
- Increases in engagement

Step 2. Determine the goals and audiences for your results

The purpose of any measurement system is to provide data to decision makers so you can continuously improve your programs. And yes, there is the secondary goal of justifying your budget, but that is seldom enough of a reason to spend the time, effort, and energy necessary to set up an integrated measurement dashboard.

Before you go any further, you'll need to have conversations with folks in marketing, sales, research, and maybe even finance to make sure you have consensus on the answers to these questions:

- What decisions will be made with the data?
- How often will reports and metrics need to be produced?
- Who will see and/or use your report?

Frequently there are two key audiences that need data, and the data and reporting will be very different for each one:

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- The first is your **staff and peers**. Managers and/or leaders in the various communications functions require detailed reports and drill-down. Presumably they need to know which campaign or initiative was most effective, which efforts aren't paying off, and which may need more resources. They'll want to see back up data behind the numbers and will need to thoroughly understand the metrics.
- Then there's **reporting up**, i.e., the report you send to your boss, VP, or the board. The data and level of detail required at the leadership level will be simple—they typically want one page of data that quickly informs them of how things are going, and where they may need to focus more resources. Remember, they see dozens of reports, and they really just want to know what needs fixing. (Never mind having the attention span of a two-year-old.) Just make sure you have your elevator speech prepared for a very short elevator ride.

Regardless of who is seeing your report, it must answer the 3 basic questions of reporting:

- **What happened?**
- **So what?** (What were the business or market implications?)
- **Now what?** (What will you do differently next time to improve the process?)

You'll want to make sure you design your integrated dashboard to answer those questions.

Step 3. Identify your data sources

Regardless of what metrics end up on your dashboard, to get the insight you need you'll need a variety of tools to capture all the requisite data. Chances are good that most of the data you need is somewhere in your organization, you just need to go hunting for it. It's a bit like a scavenger hunt, you may have to dig pretty deep to find it. Your "scavenger list" should include:

- Web analytics data from a platform like Google Analytics, Web Trends, or Adobe Omniture.
- Data on what is being said or written about you. Typically this will involve a media monitoring or social listening platform. What's important is that you have the data to tell you what conversations are taking place about you and where. Ideally you would also be tracking competitors.

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- Data from sales or product marketing on what or who motivates people to buy your product or support your cause. Typically this will be survey research data, but if that doesn't exist, just sit down with your most successful salespeople. If you have a CRM system in place (such as Salesforce) you should be able to get good data out of it. You especially want to track the source of any increases in leads or inquiries.
- Reputational and attitudinal data on how people perceive your brand or products.
- Financial data, such as monthly or quarterly budget figures.

Step 4. Define your metrics

Once you've figured out what data you have available, what motivates people to act, and how you need to report results, you're ready to start thinking about specific metrics that will show up on your dashboard. As always, go back to your goals. This table illustrates typical goals and associated metrics:

Business Goal	Comms Objective	Activity Metric	Outcome Metric
- Reposition the company	- Improve or change perceptions around our brand	- Percent increase in key message penetration - Percent increase in share of desirable voice - Percent increase in engagement with new content	- Percent increase in consideration and preference
- Increase market share	- Increase the marketable universe - Increase consideration and preference for brand or product	- Percent increase in share of desirable voice - Percent decrease in share of undesirable voice - Percent increase in share of engagement relative to the competition	- Percent increase in marketable universe - Percent increase in people preferring or considering the brand
- Reduce reputational risk	- Restore or improve reputation	- Percent decrease in share of undesirable voice - Percent decrease in negative messaging	- Percent improvement in trust scores and/or reputation index
- Increase stock price	- Improve leadership reputation - Increase awareness of what we do	- Percent reduction in cost per message communicated - Percent increase in perceptions of "well-managed"	- Percent increase in perceived value relative to the competition

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Step 5. Define your benchmarks

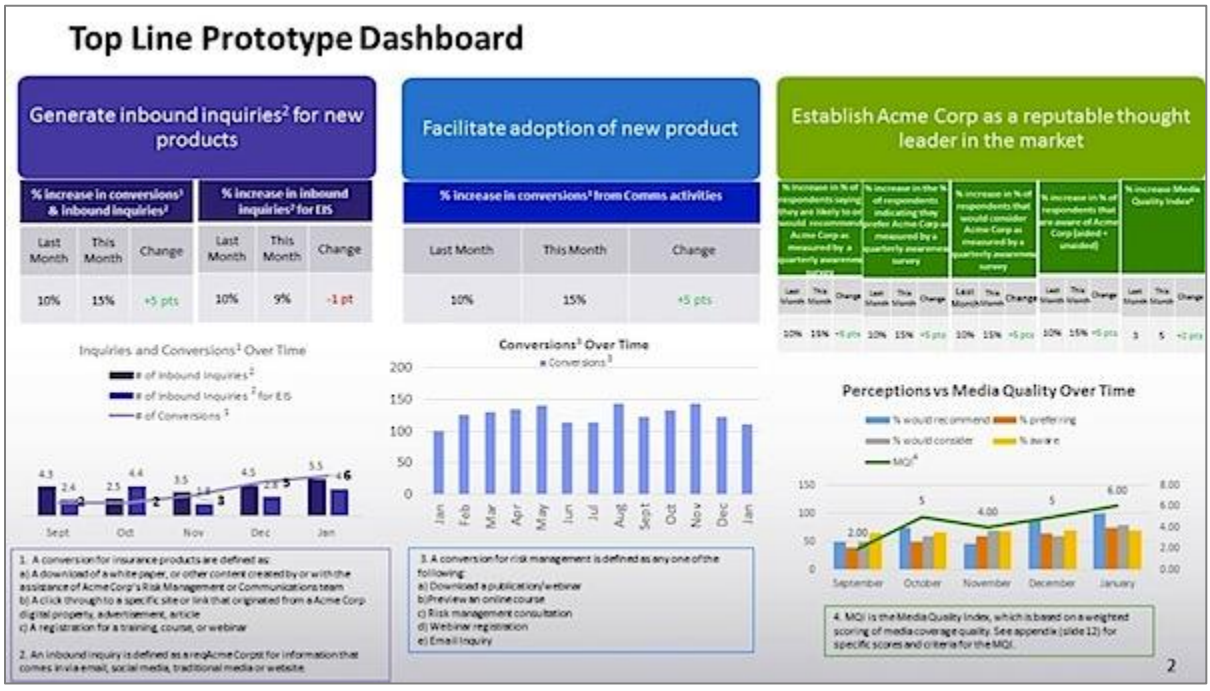
Measurement is, by its nature, a comparative tool. You don't know what is a good result or a bad result until you put it into context.

Typically that context is: Did we do better than we did last month, last week, or last quarter? But it's far more valuable to put it into the context of your market. In other words: Did we do better or worse than the competition?

If your budget doesn't allow competitive analysis, we recommend looking at a 13-18 months' worth of data. There is sufficient seasonality to marketing, thus understanding how you did compared to the same time last year is far more informative than comparing how you did to last month.

Step 6. Design a prototype dashboard

Once you have your goals, metrics, and benchmark defined, you can design a prototype dashboard. I typically do this in PowerPoint because it's easy to create dummy charts and graphs. Here are two samples of what it might look like:



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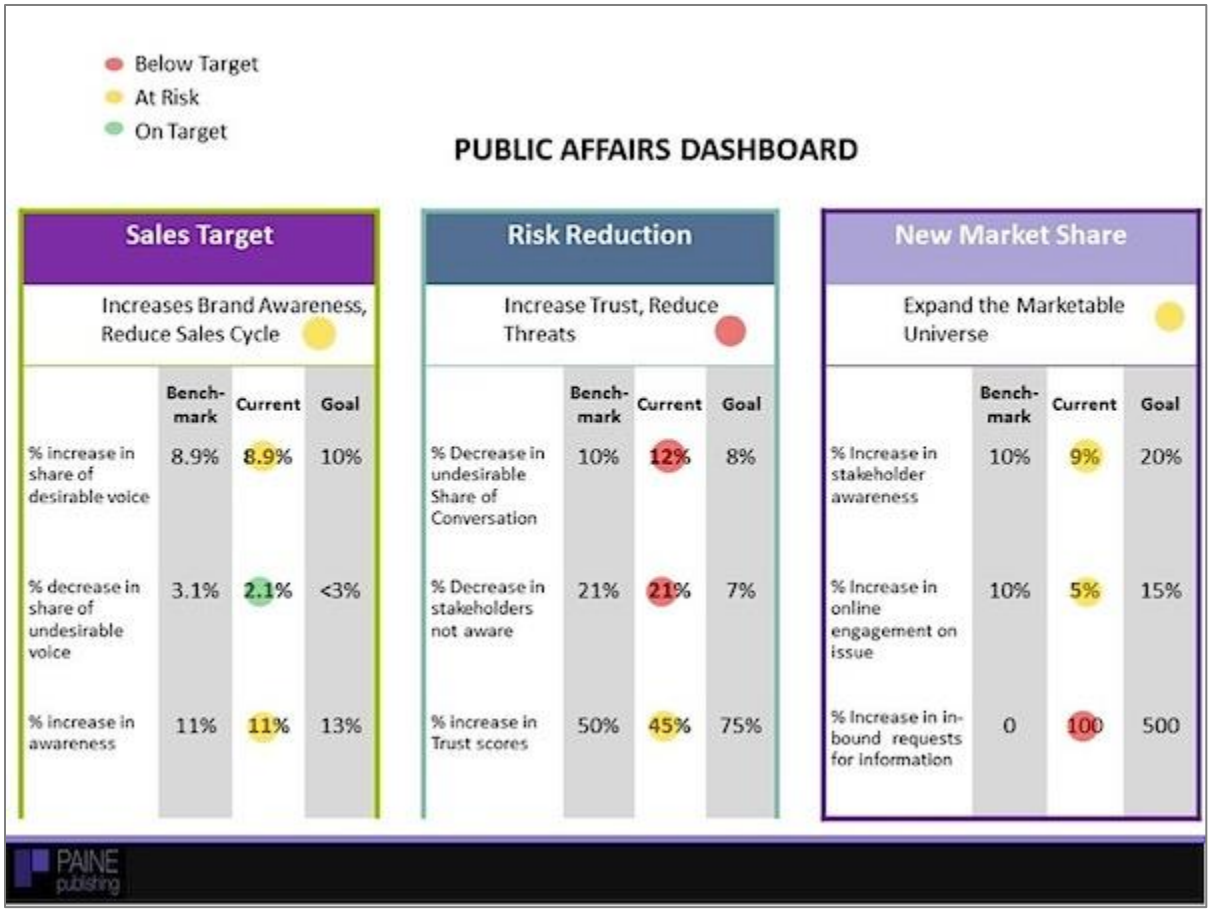

Take your prototype dashboard around to everyone who will be using it or seeing reports from it and make sure they buy into both the design and the metrics. Make sure they understand what data lies behind each chart or graph, and that they agree with your calculations. If you are using any custom indexes make sure they buy into the logic behind them.

Step 7. Implement your measurement dashboard

Once you have everyone's approval it's time to implement your dashboard. There are numerous platforms that are designed to collect data from a variety of sources and update and display it regularly. Check with your IT folks to see if your organization has standardized on a platform. Tableau, DOMO, and Qlik are some of the more popular platforms, and there are others offered by IBM, Oracle, and SAP.

If you don't have an existing platform in place, both CyberAlert and PROOF dashboards have been designed around the needs of communications professionals.

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- The legacy of CyberAlert is on the earned media side, but in their latest dashboard they've made it easy to integrate any other data (e.g., from Google Alerts, social media engagement tools, CRM systems, etc.) They're also very helpful in getting it set up exactly the way you want it.
- PROOF is a new product that facilitates comparing data of different types to look for correlations.

And finally, now that you've slogged through all the hurdles of setup, the most important element is yet to come, gleaning insight from your data.

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Chapter Three

Checklist for Creating an Integrated Measurement System

Since you just finished reading Chapter Two, we now present you with a checklist to help you create your own integrated measurement system.

(You can also download this checklist as a separate PDF by clicking here.)

Step 1: Define your goals and your leadership's expectations

☐ Meet with leadership to understand their expectations for communications results. Get consensus on goals for your dashboard.

☐ Make a list of people who influence your budget and set your priorities. Add in anyone else who will want to see or use your dashboard.

☐ Set up a meeting with leadership to understand their expectations. Make sure they're on board with your dashboard goals.

☐ Create your meeting agenda:

- Decide on your target audiences
- Decide on goals
- Decide on who/what the benchmark will be
- Decide on Key Performance Indicators (KPIs)

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☐ After the meeting, summarize the agreed-upon definitions in a document. 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.

Step 2: Determine who is going to use your dashboard and how

☐ Make sure you can answer these questions:

- What decisions will be made with the data?
- How often do your metrics need to be updated?
- Who will see and use your dashboard and/or your reports?

Step 3: Identify your data sources

☐ What will you use for web analytics?

- Who owns that web data? Can you get a user name and password? Will they generate reports for you? Can you get a full Excel export to automatically feed into your dashboard?

☐ Do you have a monitoring/listening tool?

- Who owns that monitoring data? Can you get a user name and password? Will they generate reports for you? Can you get a full Excel export to automatically feed into your dashboard?

☐ Do you have a Customer Relationship Management (CRM) platform?

- Who owns that CRM data? Can you get a user name and password? Will they generate reports for you? Can you get a full Excel export to automatically feed into your dashboard?

☐ Is there existing market research data on your company (e.g., awareness, preference consideration studies)?

- Who owns that data? Can you get a user name and password? Will they generate reports for you? Can you get a full Excel export to automatically feed into your dashboard?

☐ Do you have access to your departmental budget data?

☐ How far back can you get data?

Step 4: Define your metrics

☐ What are your communications goals?

☐ Decide on the best metrics. What are they? (Use this table if you need help)

Step 5: Define what you're benchmarking against

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☐ Identify what peer/competitor keeps leadership awake at night.

☐ Estimate amount of data you will need to collect for your competition.

☐ Do you have the budget to do competitive benchmarking?

☐ Do you have consistent data for the past 13 months? If not, how far back can you gather data?

Step 6: Design your prototype dashboard

☐ Set up a table in Excel or use Smart Art in PowerPoint and populate it with the goals and metrics you've selected.

☐ Create sample indexes and charts with the data you have.

☐ Setup a meeting to review your sample with everyone that will be using your dashboard.

☐ At the meeting, go over the indexes and any other calculations with everyone who will be using or seeing your dashboard.

Step 7: Implement your dashboard

☐ Create a detailed set of instructions that codify the decisions you made in the prior steps. Make sure that you explain how to calculate any indexes you've defined. Also spell out the definitions of positive, negative, and neutral if you're using sentiment. Give examples of any messages you are tracking, and spelling out any parameters (i.e. dates, key media, etc.)

☐ Select a dashboard platform.

☐ Import data into your platform.

☐ Analyze the data for insights, errors, and problems.

☐ Share results with your team.

☐ Share results with leadership.

☐ Train your team on how to use the platform or set up training with your chosen vendor.

☐ Congratulate yourself on a job well done!

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Chapter Four

True Tales of Integrated Measurement

2016's Summit on the Future of Communications Measurement focused on integrated measurement. Here are stories of lessons learned from three sets of presenters:

The four pillars of Sodexo's communications

We love it when senior execs appreciate the value of PR. Jennifer Williamson's background was in operations, not communications. So it was particularly telling that, two weeks into her new job as Senior Vice President of Brand and Communications for Sodexo North America, the company faced pushback from the local community just as it was about to close a major deal. "This solidified for me the important role PR plays in making sure the local community knows who we are and what we contribute, and how critical that is for sales and operations," Williamson recalled.

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Jennifer and her colleague Stephen Cox, Vice President of Public Relations for Sodexo North America, presented their case for an integrated communications strategy during a luncheon session at this year's Summit. (The photo up top shows the two of them in action. See their slide deck: "Public Relations 3.0, Sodexo in North America 2017.") They recently reorganized Sodexo North America's communications around a fully integrated system with four pillars: media relations, thought leadership, digital space, and local communities.

At the center of their reorganization is Sodexo Insights, a media publishing hub that serves as a central repository for all content such as news releases to thought leadership white papers. All other efforts—including CSR, diversity and inclusion, and traditional brand efforts—hook directly into this hub for their content.

With this model, they quickly reached a critical mass of audience that now generates between 60-70 comments a month—a high number in the B2B space. They've also learned how to target content for the specific audiences on each platform. For example, Facebook tends to be home to employees and community activities while Twitter is the source for news.

It was important to use Sodexo Insights as more than just a repository for marketing content. "We realized that thought leadership is not us talking about ourselves, it's our knowledge leaders talking about important issues in our marketplace. *If it's not advancing the body of knowledge, it's not thought leadership,"* Jennifer said.

At the heart of the thought leadership strategy is a clear framework for developing content. Since its inception 50 years ago, Sodexo has been committed to "Improving the Quality of Life" for its customers and the communities it serves. As part of that commitment the company has recently defined six core dimensions in which its services have a measurable impact on quality of life.

The team now uses these six dimensions, along with several global mega-trends, to identify timely topics where it can contribute to advancing the body of knowledge. Williamson explained: "This framework gives us a steady stream of thought leadership. The focus is not just for external use either. All content distributed externally is also shared with sales and operations

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teams internally to enhance employee engagement and strengthen relationships with existing clients."

Once they had established the framework and defined their messages, their next challenge was a dearth of content talking about the surprisingly large size and scope of Sodexo's services. Sodexo is one of the world's largest global corporations, with 420,000 employees representing 130 nationalities present on 34,000 sites in 80 countries.

One tactic they recently implemented to help potential customers and employees understand what Sodexo does is to publish content four days a week leveraging the news wires. Using traditional press release tactics, they craft and publish the story. It then lives in the Sodexo Insights repository, as well as the various news sites that automatically pick up PRNewswire's press releases.

No one expects the media to pick up all these releases, although the new approach has spurred a number of interesting on-message stories. The point is that the releases are now evergreen content online, where they can be searched, found, linked to, and used whenever the need arises. Every release features one or more aspects of Sodexo's capabilities, offers, products, or services. "We've gotten very good at taking a wide range of topics and mapping them back to those themes," explains Williamson (and the fact that all of the content is searchable helps others in the organization tap into it as needed and helps prospective new clients find Sodexo in the digital space).

The spillover effects of this tightly integrated department are huge. They publish a weekly newsletter to alert people about new content and to share info about what is being used and how. One of the benefits is that they are now working closely with the Sodexo marketing teams on integrating content and breaking down silos that lead to ineffective communications efforts. Now they're becoming part of the unified whole.

The key to Jennifer's success is her grounding in operations. She understands the numbers that are important to the business. Not just sales, but the rate of customer growth, where the customers are, and what they're buying—all are closely connected with the communications efforts. The corporate communications team has a keen focus on supporting new business development not only with new clients, but also the cross-selling of services for many of its current clients.

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Communications integration flies high at Southwest

Southwest Airlines has taken a similar integrated approach to its communications measurement. Cindy Villafranca, Senior Communications Specialist, walked attendees through the process she went through to integrate internal communications, external (both social and traditional) community relations, and business goals into a single dashboard. (See the slide deck from Cindy Villafranca's presentation: "The Role of Data, Dashboards, Technology, Data Visualization & Predictive Analytics.")

The dashboard enables them to track the interrelationships between their various efforts. For example, they had speculated on the impact of external communications sentiment on internal communications. But during the six-month timeframe they analyzed, when the data appeared on the dashboard, there didn't seem to be any correlations. Their conclusion: Burning issues for employees are not the ones that grab headlines in external media. Of course, as more data is analyzed, there could be correlations made in the future.

Integrated measurement when revenue or sales leads is not the goal

Sean Monogue, Senior Executive for International and Government Relations, Strategy, Communication, and Analytics, U.S. Air Force, and Deanna Centurion, Principal at Cyera Strategies, talked about the unique worlds of the regulated industries, for whom "sales" is never a metric. They face a delicate balance among what they *want* to say, what they *have* to say, and what they ***can't*** say. For them, measurement comes down to persuasion and relationships.

In Deanna's work with energy companies, her job is to "make friends before we need them." In other words, maintain good relationships with first responders who are frequently the second group of people at a disaster (after the company's own employees). She measures her relationships with them via a modified Grunig relationship study that she conducts as often as the budget allows.

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She is also in the enviable position of working in an industry where measuring communications outreach is mandated by law. When you think about it, it makes perfect sense. It's one thing for a company to spend money on community outreach. But, in the energy business where crises are always threatening, you need informed communities to help them react appropriately. So her clients need to measure not just whether or not people are receiving the info, but if they recall it, spend time reading it, comprehend it, and know how to act if needed.

The first thing she does when she gets data back is look for the lowest scores. She then contacts those people and finds out why. As we always say, "learn more from the failures than from the successes."

For the U.S. Air Force, Sean Monogue has an obligation to "communicate to the public what we are doing with their sons and daughters." But he also has to live within the narrow boundaries of what can and cannot be shared within the military. His roles are "to build trust, never be seen as communicating to get more funding, and overall to increase understanding of what the Air Force is all about."

At the same time, there is a very strategic intent to many of his communications. For example, when they announce a deployment of aircraft to a particular region, it's not to get headlines in the local paper. The goal is to be a deterrent—to send a very clear message to U.S. enemies about our capabilities.

Sean's requirement is to both communicate and measure those communications all over the globe. He follows a standard format of assessing outputs, outtakes, and outcomes. He measures outputs via a suite of media assessment tools, using a bespoke media quality score. To measure trust and understanding he does extensive analysis of media coverage combined with regular surveys of his audience to ensure that the right messages are being received and understood.

Currently his biggest challenge is recruiting and training airmen in sufficient quantities to meet the U.S.A.F.'s commitments. In the wake of the drawdown in Iraq and Afghanistan and the sequester-induced budget tightening, staff was reduced and budgets were shifted to

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modernizing Air Force infrastructure. As Sean put it: “To stay ahead of adversaries not just now but 30 years in the future.”

Then circumstances changed, and more, not fewer airmen were needed in the Middle East. So a broad outreach was started to recruit talent. It’s a tough challenge when nationwide unemployment rates are dropping and everyone is fighting over talent. Add to that the military tradition of rotating leadership every three years. As Sean put it, “I need to be able to collect data to enable the decisions that need to be made at the time, even if I don’t know who’s going to be making them.”

He also uses his metrics to determine where to put the resources that impact recruitment. Resources like the U.S.A.F. Thunderbirds, appearances at airshows, and deployment of the U.S.A.F. band to key recruitment communities are all important tools. He closely studies demographic and geographic maps to identify communities that have the highest incidence of likely recruits. Not just the most people, but the most potential recruits with the skills needed by the Air Force. They then use that data to determine which assets go where. (See the slide deck of Sean Monogue's presentation: "Public Affairs Measurement and Analysis: Developing Insights & Driving Decisions.")

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Conclusion

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