



LESSON GUIDE 2: How to Set Measurable Goals

This is **Lesson Guide 2** of Paine Publishing's Measurement 101 Curriculum Package. The entire package includes:

- a **Syllabus**,
- a **Reading and Resources List**,
- Six Measurement 101 **Video Lessons**,
- Six Measurement 101 **Lesson Guides** in pdf format to accompany the videos,
- Paine Publishing's **Standards Compliance Curriculum package**
- a subscription to *The Measurement Advisor* newsletter
- access to "**Ask Katie Paine**" monthly online measurement hours

The six Measurement 101 Lessons include:

Lesson 1: **Why Measure?**

Lesson 2: **How to Set Measurable Goals**

Lesson 3: **How To Define And Prioritize Audiences**

Lesson 4: **How To Define The Right Metrics**

Lesson 5: **How To Select The Right Tools**

Lesson 6: **How to Get Insight From Your Data**





Introduction to Paine Publishing's Measurement 101 Curriculum



Hello! I'm Katie Paine, CEO of Paine Publishing. I've been helping people to design and implement communications measurement programs for more than 25 years. Consider this six-lesson Measurement 101 Curriculum your Personal Navigation System on the road to the perfect measurement program. We take you right through the measurement process—from setting goals to interpreting results.

Welcome to Lesson Guide 2...

How to Set Measurable Goals

This lesson is a big picture view of defining the very purpose of your communications program. The *goals* of your communications program are the overall desired ends, whereas the *objectives* are specific aspects of those goals. Measurable objectives are the vital foundation of any good PR or social media program.

A goal is, “a broad idea of what one would like to happen,” whereas an objective is, “a clearly defined statement that includes an action statement (a verb), a timeline, and a measurable outcome,” according to Drs. Donald Stacks and Shannon Bowen, both of the Institute for Public Relation’s (IPR) Measurement Commission.

Start by defining success

To set measurable objectives, you begin by understanding your goals, and by defining



what success means to you and the people you work with. This is often not an easy task. It may take considerable effort to achieve consensus in your organization.

The best way to reach consensus is to gather all the players (for instance, all the Managers: Product, Brand, Comms, Internal, External, Social, and Community) into a room and ask them how they personally define success for their department or group. Then ask them the following questions, suggested by the IPR's Measurement Commission:

- What is management trying to achieve and what will help or hinder our success, from an overall-business perspective?
- Who do you consider to be our priority stakeholders?
- What themes would the organization like to communicate to our key stakeholders?
- What response would management like from target stakeholders?



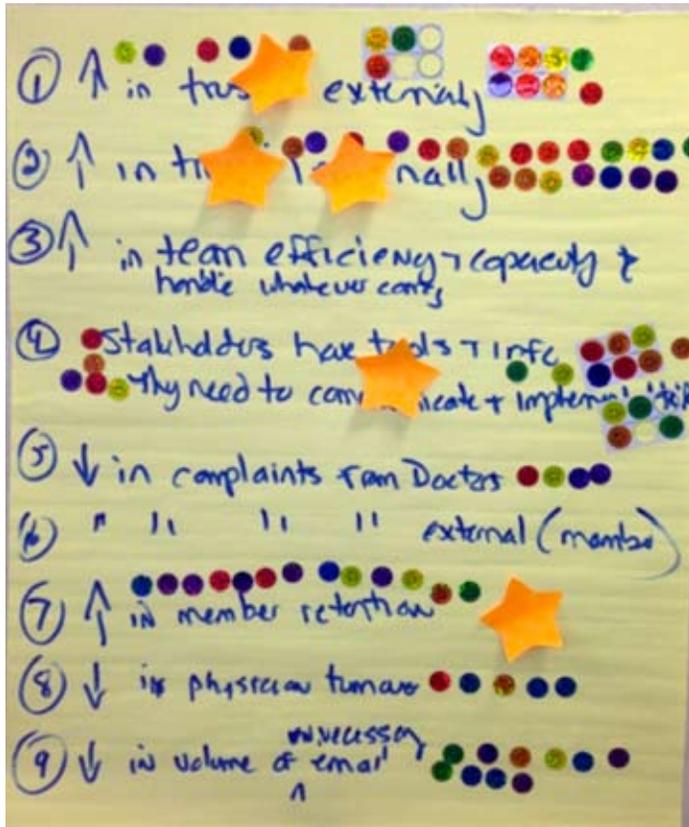
- How does management think PR programs can help achieve these goals?
- What does success look like? To what degree is this success meaningful, reasonable, and measurable? How can we link success to objectives that are meaningful, reasonable, and measurable?
- What is the optimal timeframe for completing these goals?
- What barriers has the organization or any of its units faced in the past that stood in the way of meeting the objectives that were set?
- What are our key competitors doing and how are we different?

Try this “Champagne Moments” exercise to define success for your department

Finally, ask them the most important question of all: *How do they define success for your department?* In other words, what do they expect you to accomplish?



Another way to ask this question is to pose this scenario: It's the end of the year and your boss walks into your office and places a case of champagne on your desk and says, "Congratulations! Take an extra week off, and I'm giving you a 10% raise!" What achievements could you have accomplished that would so delight your boss that he or she would do that? Write all these "champagne moments" on a flip chart.



Now get together some colored sticky dots. Give everyone in the room money or dots representing \$1 million to spend on achieving those amazing successes. Have them stick their dots on the flip chart next to where they want to invest. They can spend it all on one moment, evenly divide it between several, or allocate it in some other way, but they have to spend it all. Give the most senior person in the room dots of a different color, so you'll be able to give that person's vote more weight if you need to break a tie or settle an argument.

Once all the dots are in place, add up the totals. You'll end up with something like the flip chart to the left.

The definition of success that ends up with the biggest budget is your most important goal. The second biggest budget is the second goal, and so on. Try to keep the total number of goals to five or less, because you probably won't be able to track more.

If necessary, group similar goals into categories. For example, if you have several “champagne moments” that relate to awareness and preference of different brands or initiatives, you can group those into one overall “awareness” goal.

Use your goals to set SMART objectives

Congratulations, you've narrowed down your goals. Now use them to set your objectives. Specific metrics come later (Lesson 4), after you've figured out more details, like who is the target audience, what is the benchmark, and how much are you willing to spend to get the information?

Best practices and measurement industry



standards require that your objectives be SMART: **S**pecific, **M**easurable, **A**ttainable, **R**ealistic, and **T**imely. SMART objectives include the answers to the questions: By when? and How many?

The IPR offers these examples of typical SMART objectives:

- **To Increase Awareness:** Raise awareness of “cleaning power” among women 25-34 from 20% last year to 50% this year.
- **To Increase Comprehension:** Create an understanding of insurance pricing models among 75% of insured adults by the end of the campaign in November.
- **To Change Attitudes:** By the end of the year, convince 10% of customers that bank fees are an acceptable charge.
- **To Change Behavior:** Between this year and next, increase from 15% to 25% the percent of insured customers who

Specific
Measurable
Achievable
Relevant
Time-based





recommend our brand to their friends or family.

Categories of goals

While your specific goals will vary depending on the nature of your organization, its programs, and maturity, chances are good that they will fall into one of the following categories. These categories are important because they determine what tools you will use to measure your success.

Brand or Mission:

Changes in perceptions or awareness of your brand or mission

Changes in positioning of your brand or mission

Relationships:

Improvement in or establishment of relationships

Changes in the health and strength of your relationships with stakeholders

Behavior:

Increases in specific actions, such as attendance, donations, volunteerism, or memberships

That's all well and good, but management wants dollar signs. Can I put a monetary value on my results?

Yes, but only if you understand what role PR or social media or whatever you do plays in growing the business. That requires a conversation between senior management, marketing, sales, and the PR team to make sure that expectations are agreed upon by everyone. Specifically, how do they think you or your department contributes to a sale or a desired outcome? Once you've had that conversation, you can figure out how to assign or attribute value.

Behavior—If your expected contribution goals fall into the Behavior category and involves generating sales, then you can track sales from specific PR events with unique URLs that will record traffic



back to a PR page or site. You can also use a customer relationship management system to track leads that come in through PR or social media or a specific event. Non-profits can frequently tie PR efforts back to donations and volunteerism, but you need to set the system up to track it *before* you begin your program.

Brand or Relationship—However, if your definition of success falls into the Brand or Relationship categories, then chances are you won't be able to put a short term monetary value on your programs. Changes in perceptions or relationships have monetary implications over a longer term, and are typically measured by lower costs of doing business, lower turnover, higher retention, shortened sales cycles, etc. (See [Fussell, et al.](#)) Again, it's all measurable and quantifiable, but you need to put the system in place before you begin.

How do I put those systems in place?

Your first step should be to check with your market research department. If you don't have one, check



with finance, marketing, or sales. Chances are they'll have most of the data you need. And it's very possible that they already have some metrics or a marketing mix model in place. But, if they lack any valid data from PR or social media, then they are probably attributing all success to paid marketing efforts or advertising.

What specific social media metrics are the most important to measure?

Only those metrics that contribute to sales, cost reduction, or greater efficiency. The rest are probably vanity metrics that track your popularity, but that don't connect your efforts to a business objective. (See [Anderson, et al., 2009](#))



Lesson Two Study Questions

1. What is the goal or mission of your organization? What is the goal or mission of your department? How do the two relate?
2. What are the short-term, mid-term, and long-term results that your boss expects to see as a result of your communications strategy?
3. How do you translate those into value for the organization? How does it translate into increased revenue, time savings, or being more effective?
4. What is the connection between your activities and your mission?
5. Are your goals primarily revenue related or relationship focused?
6. Are your goals in line with your activities and metrics? Can you see the connection between what you do and organizational success?

Lesson Two Suggested Readings

Chapter 2: Paine, K.D. (2011). *Measure what matters: Online tools for understanding customers, social media, engagement, and key relationships*. Wiley, 2011.
http://www.amazon.com/Measure-What-Matters-Understanding-Relationships/dp/0470920106/ref=sr_1_1?s=books&ie=UTF8&qid=1397600758&sr=1-1&keywords=Paine+Measure+What+Matters

Chapter 5: Kanter, B. & Paine, K.D. (2012). *Measuring the networked nonprofit: using data to change the world*. San Francisco: Jossey-Bass.
http://www.amazon.com/Measuring-Networked-Nonprofit-Using-Change/dp/1118137604/ref=sr_1_1?s=books&ie=UTF8&qid=1397600656&sr=1-1&keywords=kanter+and+paine

Anderson, F.W., Hadley, L., Paine, K.D., Weiner, M., Grunig, J., & Lindenmann, W. (2014). ***Guidelines for setting measurable public relations objectives: an update***. Gainesville, FL: Institute for Public Relations.
http://painepublishing.com/wp-content/uploads/2014/04/Setting_PR_Objectives-1.pdf

What is Paine Publishing?

Paine Publishing is an educational publishing company that helps organizations establish effective, meaningful communications measurement programs that are in compliance with industry standards.

- We publish [*The Measurement Advisor*](#), the newsletter for professional communicators who want data and information to continuously improve their measurement programs and bring standards into their organization.
- We offer measurement education packages that include specific case studies, white papers, presentations, and checklists, on the following topics:
 - [Best Practices and Measurement Standards Compliance](#)
 - [Travel and Tourism Best Practices and Standards Compliance](#)

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