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THE COMMUNICATOR'S GUIDE TO RESEARCH, ANALYSIS, AND EVALUATION

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INTRODUCTION

Today's CEOs look for problem-solvers who operate beyond their lines of business to help drive the organization forward. CEOs seek partners who prioritize the best interests of the enterprise, who operate efficiently, and who serve as integrators across functions. Ideally, within the C-suite, the Chief Communication Officer (CCO) plays the role of a key integrator in order to align stakeholders for optimal business outcomes. To align these audiences — some of whom may not agree on fundamentals — communication professionals must embrace the necessity of research, analysis and evaluation to represent PR performance through the common language of data. By translating PR results to everyone's benefit, communicators minimize emotional decision-making, mitigate risk, gain efficiencies, and optimize business outcomes. If CCOs choose not to quantify how and the degree to which their work effectively drives the business agenda forward, CEOs will look elsewhere for those who rise to the challenge. On the other hand, those CCOs who choose to elevate the enterprise by acting as an integrator, understand that one of the best ways to communicate PR's contribution is to quantify its unique impact using research, analysis, and evaluation to enable better business decisions and to mobilize the organization onward.

CCOs face great challenges as traditional business models undergo significant disruption. The speed of business and the velocity of information delivered and consumed continues to accelerate, forever changing the way organizations communicate with internal and external stakeholders. In addition to traditional responsibilities to positively differentiate the organization and its reputation, the duties of today's CCOs include:

MANAGING THE "SAY-DO GAP:"

Stakeholders closely monitor the delta between what companies **say** and what they **do**[1]. As a result, organizations face increasing pressure to communicate and validate their activities. Employees, shareholders, donors, alumni, customers, and the communities in which they operate also hold expectations of the organization, which applies additional pressure for organizations to perform well and contribute positively to society.

COMBATING MISINFORMATION AND DISINFORMATION:

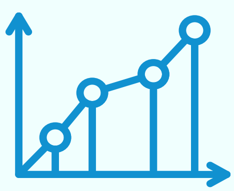
In an era of mistrust, companies must develop messaging that breaks through the deluge of information to reach and credibly resonate with stakeholders. Stakeholders expect CEOs, companies, and public relations professionals to combat misinformation (false information) and disinformation (deliberately misleading information). But there is a gap with how well these professionals are actually doing it, according to an Institute for Public Relations report[2]. As a result, communicators must develop and disseminate timely, accurate, and purposeful messaging. At the same time, they must monitor, prioritize, and act on emerging issues at the speed of business. This often translates into "real-time" decision-making, execution, and evaluation.

MITIGATING REPUTATION RISK:

Organizations face unprecedented scrutiny in today's business and social environment. As such, communicators must manage reputation like any other business asset to optimize the upside and mitigate risk. The effects of a critical reputation incident have never been more punishing than they are now. Ongoing research — both in-depth and real-time pulse checks — help the enterprise to stay ahead of threats and respond quickly, purposefully, and accurately if such a threat occurs.

EMBRACING THE ADVANCEMENT OF SKILLS AND TECHNOLOGY:

Now and in the long-term, technological changes will continue to accelerate; advancements in artificial intelligence [3], behavioral science [4], big data analytics [5], and other areas of technology continue to advance the ways in which companies engage with their internal and external stakeholders. These advances provide communicators with strategic intelligence about stakeholders and their preferences for compelling and credible content. While technology evolves, communicators must complement automation with innovative thinking, business acumen, and communications expertise to promote engagement and positive business outcomes.



DEMONSTRATING – AND GENERATING – A POSITIVE QUANTIFIABLE RETURN ON ONE'S PR INVESTMENT:

Beyond simple measures of public relations performance such as clip-counting, organizations expect their public relations and corporate communication departments to uphold their responsibility and tangibly contribute to driving a positive financial return whether that translates into increases in sales, profitability, donations, or enrollment; greater efficiency by doing more for less and with less, or avoiding/mitigating catastrophic cost.

Therefore, this guide was created to help public relations leaders understand how they can **apply** data, research, and analytics to uncover insights that inform strategic decision making, improve communication performance, and deliver meaningful business contributions.

WHY RESEARCH, ANALYSIS, AND EVALUATION ARE IMPORTANT

The importance of communication research, analysis, and evaluation continues to grow due to the pace of change in the marketplace and the corresponding need to make smarter and better decisions at the speed of business. The ability for an organization to successfully transform during this time of dynamic change requires the active leadership of the CCO and the application of talent and technology to perform the work, measure its impact, and improve at each stage of the public relations process. Communicators must embrace the data that represent their performance and continue to apply that communication performance data as they evolve from “no data” to “simpler output-based tactical and performance data reporting” to “outcome-based, data-informed predictive analysis and insights.” This evolution requires professionals to acquire new skills and partner either internally or with third parties to measure and evaluate initiatives to uncover the actionable insights and strategic guidance that empower better public relations and business decision-making. This, in turn, lays the foundation for communicating public relations value, exceeding expectations, and delivering meaningful results in the language of business.

One may assume that every serious public relations practitioner supports research and evaluation, but this is not the case. A brief conversation with the CEO at a top mid-sized PR firm revealed the truth when he said, “I’d rather forego being a proven success in exchange for never being a proven failure.” [6] Unfortunately, some communicators also share this opinion.

RESEARCH, ANALYSIS AND EVALUATION IN THE PUBLIC RELATIONS PROCESS

Research drives each step along the way from landscape analysis, objectives-setting, strategy development, tactical execution, evaluation, and continuous improvement.

MEASUREMENT, ANALYSIS, AND EVALUATION

Before exploring how to apply research to analyze and evaluate communication, it is important to recognize the nuanced differences among measurement, analysis and evaluation:

- **MEASUREMENT** is what can be observed and counted of a public relations program or campaign. How many blog posts were written? How many people came to the event? How many followers were gained? How many people visited the website?

- **ANALYSIS** is the systematic process by which we apply our professional and sector expertise as well as our statistical acumen to answer questions beyond "what happened?" to answer "why did it happen?"

- **EVALUATION** requires taking a holistic look at a program or campaign to determine the degree to which strategies and tactics achieved the desired public relations objective and the extent to which activities contributed value to the organization — whether that value is financial, reputational, relational, or policy/political. During the evaluation process, one gains insight that enables the communicator to tweak and improve communication strategy.

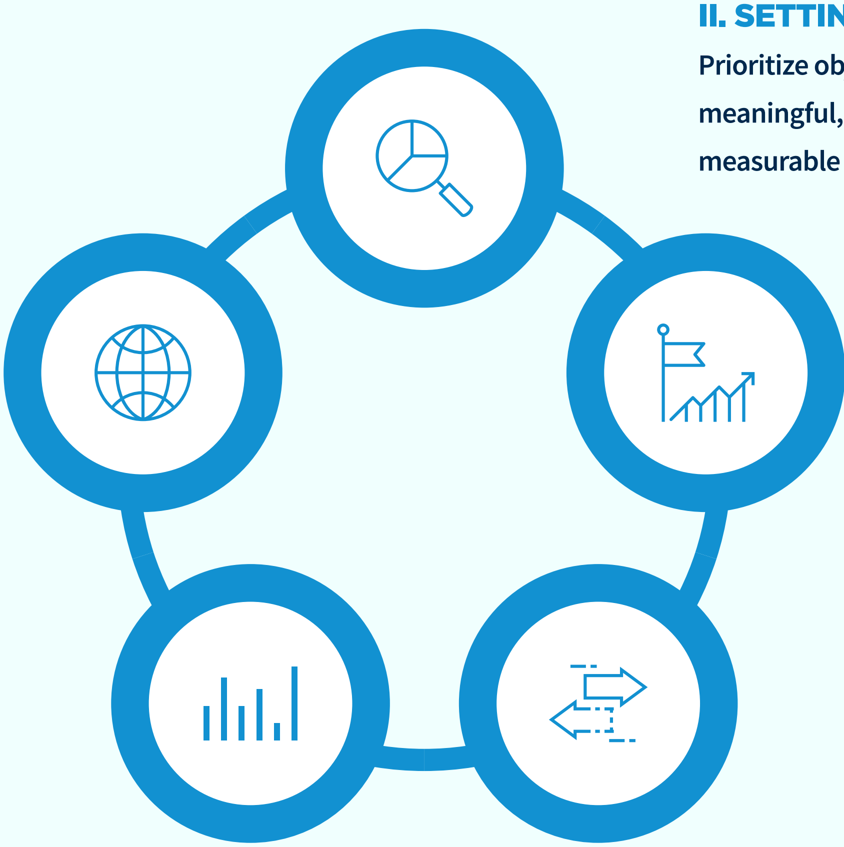
The following process that serves as the cornerstone for this report is based on five core components to communication research, analysis, and evaluation. The repetition of this cyclical (not linear) sequence lays the foundation for continual improvement. This report focuses on these five core components in detail.

I. LANDSCAPE ANALYSIS:

Primary and secondary research to scan and evaluate one's business environment both internally and externally.

II. SETTING OBJECTIVES:

Prioritize objectives which are meaningful, reasonable, and measurable



III. DEVELOPING STRATEGY:

Interpretation of research to identify key messages and target stakeholders including employees, customers, shareholders, the media, regulators, and more.

IV. TACTICAL CREATION AND ACTIVATION:

Research-based program execution to pretest tactics and campaigns for their ability to captivate stakeholders.

V. EVALUATION AND CONTINUOUS IMPROVEMENT:

Research-based evaluation to assess the extent to which the program met or exceeded the original research-based objectives.

FIVE CORE COMPONENTS OF RESEARCH, ANALYSIS, AND EVALUATION

ONE

THE LANDSCAPE ANALYSIS

For public relations efforts to realize their full potential, professionals should begin with a clean slate: no preset objectives, preconceived strategies, or predetermined outcomes. This approach is a very effective tool for annual planning processes, but a more condensed and focused version should also be considered around development of core programs and initiatives. A clean-slate atmosphere provides a fresh start for reexamining the priorities of the organization, how they affect public relations, and what public relations can do to advance those priorities. A landscape analysis begins with a dispassionate look at past performance, performance vs. competitors, conventional wisdom, and what has come before. At the same time, environmental factors and emerging issues that affect the enterprise should also be examined including regulatory action, societal trends, and popular opinion. Everything is open for review in the pursuit of new thinking in support of breakthrough opportunities and explosive growth.

Clean slate public relations research should answer the following questions:

- What is the current environment? What factors are affecting and will affect the organization externally and internally? What changes are happening to the industry?
- What does the organization seek to achieve, and how does our environment reflect our position?
- Who are our friends, competitors, and opposition, and how do they operate?
- What place does the company hold within the current environment? Why is this? Is it likely to continue?
- What does the organization need to know to improve its position?

WHY CONDUCT A LANDSCAPE ANALYSIS?

There are six reasons for conducting a landscape analysis to understand the current business and communications environment, both internally and externally:

1. To evaluate competitive movement to calibrate existing positioning and inform the future
2. To gauge regulatory activity and its potential to impact the enterprise
3. To understand societal and cultural trends to assess opportunities and vulnerabilities
4. To recognize the preferences and priorities of current and prospective customers and other stakeholders
5. To calculate company performance and positioning based on the above
6. To assess the awareness, attitudes, and behavior of employees and other internal stakeholders

LANDSCAPE ANALYSIS RESEARCH METHODOLOGIES

Sources of a landscape analysis may include:

- Secondary research about economic trends, market developments, the external environment, social tendencies, competitors, and the industry.
- Data from departments within the organization but outside of the communication department that may provide valuable stakeholder information
- Surveys or focus groups with internal or external stakeholders to elicit their attitudes, opinions, or preferences that may inform a program or campaign
- Traditional media analysis to determine what the media are reporting about the organization, its competitors, and its operating environment
- Social media analysis to determine what stakeholders are saying about the organization and its competitors
- Web analytics — including attribution analysis[7] — to develop demographic and firmographic profiles of stakeholders and track stakeholder preferences, levels of engagement, and transactional (purchase) preferences

EXAMPLE:
LANDSCAPE ANALYSIS INFORMS CAMPAIGN PLANNING

An online retailer has a business goal of increasing clothing sales among college-aged women. The company's communication team is tasked with creating a public relations campaign that will contribute to the company's business success. Before developing the campaign, the retailer's communication team conducts a landscape analysis that includes:

- An in-depth analysis of the company's competitors' platforms to determine how stakeholders are engaging with competitors and on which platforms.
- Traditional media analysis of the retailer's and its competitors' media reputation; an analysis of the retailer's past business performance, including peak purchase months, most-purchased items, and top referrals to the website.
- Secondary research about current fashion trends, the external environment, and recently successful public relations campaigns in the retail industry. This research provides information about the retailer's and its competitors' strengths, weaknesses, opportunities, and threats. These findings are used to provide direction for the development of a public relations campaign that is rooted in research.

This insight from the landscape analysis provides a foundation of knowledge about the organization, its competitors, and societal/cultural trends so that future objectives, strategies, and tactics are well informed, purposeful, and reliably backed by research.

TWO: SETTING OBJECTIVES

In every business case there is an objective which might include generating a profit, promoting legislation, or giving back to a community to build relationships, reputation, or sustainability. To advance the organization, professional communicators must clearly understand the organization's aims in order to help the organization achieve its business objectives. While each component of the research-based public relations continuum is integral to achieving positive results, the initial stage of objectives-setting research is the most important. Yet, it is also the most frequently overlooked. Setting objectives is the foundation for the entire public relations program on which strategy, execution, and evaluation are formed. Setting and then exceeding objectives that are meaningful, reasonable, and measurable support the communicator's ability to demonstrate the value of public relations and provide forward-looking insights.

WRITING MEANINGFUL, REASONABLE, AND MEASURABLE OBJECTIVES

The difference between a goal and an objective is that goals are relatively vague but represent an overall outcome the public relations professional wants to achieve. They should align with the business goals and reflect the aspirations of the organization. Objectives, on the other hand, are measurable and focused, serving as a guide and allowing professionals professionals and others to see how and when they have been met or exceeded. To elevate public relations, one must generate and demonstrate a positive return. While demonstrating the value of public relations is among the profession's most vexing challenges, the best path is also the most direct: work with executives who control the budget and evaluate performance to set objectives that are meaningful, reasonable, and measurable. Therefore:

- Meaningful objectives align with organizational goals and with the goals of executives in charge of evaluating and/or funding public relations.
- Reasonable objectives are openly negotiated with the executives who evaluate and fund public relations programs and confirm what the public relations function can realistically be expected to deliver.
- Measurable objectives ensure that communication performance can be easily quantified regardless of whether the person evaluating performance understands public relations or not. Measurable objectives specify:

- What should be achieved ("to increase awareness of our socially responsible investment funds")
- The target stakeholder ("female millennials")
- The time frame ("from June to August")
- The desired measurable change ("raise awareness by 7%")

Objectives should follow the SMART (specific, measurable, attainable, relevant, and time-bound) format, which allows for the creation of strategies and tactics that clearly align with each objective and the ability to later demonstrate a return on expectations.

Unlike indeterminate objectives like "generate buzz," "break through the media clutter," and so on, the objective is specific and clear, such as: "to increase awareness of our socially responsible investment funds by 7% among female millennials from June to August."

WHY SET OBJECTIVES?

Research takes the emotion out of objective setting. There are six reasons for setting clear, concise, and pre-negotiated public relations objectives:

1. Create a structure for prioritizing action among members of the communication team.
2. Allow the team to stay focused and circle back to the objectives to ensure the strategies and tactics support achieving (and hopefully exceeding) the objective.
3. Reduce the potential for disputes before, during, and after the program.
4. Increase efficiency by concentrating resources where they will make a difference, thereby reducing waste.
5. Help to form successful programs by focusing attention and action on those criteria by which the program will later be evaluated.
6. Set the stage for evaluation by enabling public relations investment decision makers to determine if the public relations program delivered on its promise.

OBJECTIVE-SETTING RESEARCH METHODOLOGIES

Research methods to inform objectives may include:

- Data or information gathered from conducting a landscape analysis (i.e. market research, traditional media analysis, social media analysis, web analytics, and digital media attribution) to inform objective setting
- Primary research (research the organization conducts, such as a surveys [proprietary or syndicated] or focus groups with internal or external stakeholders) or secondary research (research that has already been conducted by the organization or another entity) that validates the problem or opportunity the objective seeks to address
- Internal research to ensure that PR objectives align with overall organizational goals as determined

through a review of the enterprise's mission statement and publicly-stated priorities

- Leveraging prior company data as a baseline that objectives will be measured against

DEFINING METRICS AND KEY PERFORMANCE INDICATORS

When setting objectives, it is important to define metrics and indicators that communicate success. For instance, the example objective above seeks to "raise awareness of our socially responsible investment funds." To one person, raising awareness might mean securing media placements about the investment funds. To another, it might mean surveying the intended target stakeholder (female Millennials) to gauge if they are aware of the investment funds. Having a clear definition of the desired key performance indicators and how they will be measured better determines the potential success of the objectives. Regardless, the metrics should be valid, meaning that they must actually measure what they are supposed to measure. For example, some may use impressions to measure awareness, which is not a valid metric for measuring awareness. [8]

DIFFERENTIATING BETWEEN OUTPUTS, OUTTAKES, AND OUTCOMES

When writing measurable objectives, it is important to recognize the difference between measuring outputs, outtakes, and outcomes. Ultimately, all are reflected in your objectives since they are interrelated.

OUTPUT — The number of communication products or services resulting from a communication process; the number distributed and/or the number reaching a targeted stakeholder.

EXAMPLE OF AN OUTPUT:
How many internal messages did the organization send on a particular issue?

Outputs are a measure of production and distribution. They are focused more on what the organization does rather than how the program affects the attitude or behavior of the intended audience. Other important metrics include outtakes and outcomes, especially behavioral measures as communicators ultimately seek to ignite behavioral change.

OUTTAKES — Measurement and analysis of how stakeholders respond to programs, initiatives, campaigns, and content are a foundational layer for optimizing and highlighting the value of public relations investments. Although many communications KPIs are more perceptual in nature (e.g., brand, reputation), outtakes are a key underpinning as they are clear and tangible (e.g., view, open, read, share, download, etc.). In this way, "outtakes" may be considered as "short-term outcomes." What did they take away from the communication program?

EXAMPLE OF AN OUTTAKE :
The degree to which a stakeholder "received the message" as measured in terms of awareness, recall, understanding, and retention.

OUTCOMES— This is the ultimate goal and related KPIS to which leading senior communicators aspire.

Outcomes are more macro and often more perceptual in nature. These often include a quantifiable change in awareness, knowledge, attitude, opinion, brand/reputation equity and/or behavior levels that occur as a result of public relations programs, initiatives, or campaigns – an effect, consequence or impact of a set or program of communication activities or products, and may be either short-term (immediate) or long term.

EXAMPLE OF OUTCOMES:

Outcomes represent what's on the minds of stakeholders including awareness, preference, and purchase intention, for example

Organizations should also think about the impact of a program on business outcomes, such as: *How did the PR program affect people's attitudes toward the company or its product because of public relations actions taken or tactics deployed?*

The table below provides example metrics one might use to measure internal or external communications. (Metric definitions can be found in the appendix.)

OUTPUTS	OUTTAKES	OUTCOMES*
Number of tactics, events, and materials produced, sent, or distributed *(i.e. newsletters, brochures)*	Followers/subscribers	Awareness
Traditional and social media coverage	Click through, likes	Knowledge/understanding
Share of voice	Retweets	Attitudes/opinions
Circulation/audience/reach	Engagement (i.e. comments, shares)	Reputation
Mentions	Recall, awareness, understanding, and retention	Trust
Tone of coverage, intended and unintended message pull-through	Web analytics (i.e. unique visitors, bounce rate, downloads, clickthroughs)	Transparency
	Open rate	Attendance/product/service Consideration
	Ratings/testimonials	Products/ service preference
	Viewership/readership	Customer purchase/acquisition and retention
		Employee acquisition and retention
		Satisfaction
		Loyalty
		Advocacy *(e.g. Net Promoter Score (NPS))*
		Brand equity
		Brand valuation
		Behavior/sales
		Other behavioral change *(e.g. donate, vote, partner, policy change)*

** typically measured through combination of research, such as interviews (e.g., stakeholder interviews), focus groups, surveys, and operational or public data such as share price, public health records, etc.*

WHAT ABOUT ADVERTISING VALUE EQUIVALENCY?

A discredited but still employed output-level metric is advertising value equivalency (AVE). AVEs measure the amount of time and space occupied by a news item and then applies an advertising value based on the purchase of an equivalent amount of time and space. In some cases, users of AVEs assume that earned media (public relations) is more valuable than paid media (advertising) because it is not purchased and displays the editorial imprimatur of the journalist. As a result, some multiply the base AVE to reflect the added assumed value. This process is referred to as "the multiplier effect" (Michaelson & Stacks, 2007, p. 3)[13].

According to Weiner and Bartholomew (2006), "The value is often boosted by multipliers which range from 2.5 to 8.0" (p. 2)[14]. However, researchers and scholars have debunked the validity of AVEs and multipliers (Michaelson & Stacks, 2007; Watson, 2012)[15]. Additionally, the Barcelona Principles 3.0, which were developed by the Association for the Measurement and Evaluation of Communication (AMEC) as an overarching framework for communications measurement, state that AVEs "do not measure the value of PR or communication, media content, earned media, etc." (AMEC, n.d.)[16].

EXAMPLE:
RESEARCH LEADS TO MEASURABLE, OUTCOME-BASED OBJECTIVES

A university has an overarching goal of increasing its number of incoming college freshmen on scholarship. The communication team conducts a pre-campaign survey with high school seniors and discovers that most were not aware that the university offers scholarships to students based on financial need and academic merit, which was determined through secondary research to be a critical decision factor for applicants. Students also say they plan to decide which colleges to apply to by fall. With this information, the university develops a communication campaign. One of the campaign's objectives is: To increase awareness of the university's scholarship opportunities among targeted high school juniors or guidance counselors by 10% before the end of July. This objective is outcome-based, data-driven, and aligns with the university's overarching goal. The communication team decides this objective will be measured by conducting a pre- and post-campaign survey with high school seniors to gauge their awareness of the university's scholarship opportunities. These objectives are research-based, measurable, and the metrics of success are defined.

THREE DEVELOPING STRATEGY

Once the landscape is understood and the objectives are specified, the strategy development process begins. Stakeholder segmentation, media prioritization, and message engineering research help pinpoint which messages and media perform best in terms of compelling and credible communication with target stakeholders (both internally and externally). The result is stakeholder-centric communication that lays the groundwork for purposeful strategy and the tactics that follow. Strategies — unlike tactics — remain in place over time and must support a variety of tactical bursts of activity to drive results. As such, research helps to inform the messaging and targeting approaches that are most likely to survive short-term market shifts to deliver positive, sustainable results.

PRIORITIZING STAKEHOLDERS AND TARGETING MEDIA

Assumptions, intuition, and experience are not enough to make strategic decisions. Research, analysis, and evaluation must be conducted about stakeholders, including media, to truly understand who they are and what messages will resonate.

It is vital to place great focus on foundational research to discover which media perform best in terms of target stakeholder reach and target stakeholder penetration (reach = "total number of people" while penetration = "highest percentage of target stakeholder reached through an individual media outlet"). The media targeting process should involve some form of foundational research, which may include:

- A survey to uncover the stakeholder's awareness, attitudes, and behavior toward an individual medium as well as their media consumption preferences. These stakeholder attributes are further validated through a content analysis of news and social media
- Social media analysis to profile stakeholders by their comments and how they self-identify as well as the content to which they hyperlink through social sharing
- Demographic/firmographic data available directly through attribution technology or indirectly through third-party data providers of media demographics

In addition to identifying the media with the highest potential, strategy research would also reveal the relative authority and receptivity of journalists and influencers whose content appears in the media (traditional and social).

MEDIA ANALYSIS

Professional communicators must find the balance among the media that are:

a) Important to the target stakeholder

b) Most likely to cover news about the organization

c) Least likely to cover competitors

While an analysis of demographics and firmographics will tell which sources deliver the highest penetration among actual and potential customers, it will not indicate which media are more likely or less likely to cover a story. However, a media analysis will tell which media are more receptive to the organization's news and its competitors. With this, content analysts can quantify the presence of intended and unintended messages, capture any particular reporting tendencies, and reveal a roadmap toward better results. This combination (the demographic audit and the media analysis) will reveal which media are considered the most credible, which match the often subtle interests of the stakeholder, and which compel the highest levels of engagement among the targeted stakeholders. Combining media demographics and surveys with media analysis creates a foundation for action.

MESSAGE ENGINEERING/TESTING

Positioning or messaging is not a purely creative endeavor; research-based “message engineering” is an example of how science and creativity come together to result in more effective public relations. The science behind public relations enhances the creative process and helps illuminate the most compelling and credible messages. Message engineering is a research-based, stakeholder-driven process of developing brand, issue, or corporate positioning. When developing an optimal messaging strategy, research helps the communicator to:

- Understand what motivates the target to act
- Determine the degree to which the proposition can be made credibly by the organization and matches the target stakeholder’s priorities and reality
- Evaluate how the competition or opposition performs against those needs
- Consider aspects of the messaging that hold potential to be misinterpreted, hijacked, or somehow otherwise detrimental from certain perspectives

Message engineering provides the communicator with a framework for delivering compelling, credible, and clearly differentiated positioning.

When stakeholders are targeted through the most credible media channels, organizations gain the ability to deliver clear, concise, and compelling messages to achieve objectives.

WHY DEVELOP RESEARCH-BASED STRATEGIES?

There are six reasons for establishing research-based strategies:

1. Enables more efficient tactical planning and execution due to the research-based strategy development process
2. By putting stakeholders first, focuses resources on the objective rather than conventional wisdom, pure creativity, or vanity
3. Mitigates risk by pre-testing strategy before execution
4. Allows for a sustainable strategy
5. Provides a common language to gain alignment in advance among executives who sponsor or evaluate corporate communication performance
6. Creates alignment with peers across the function, enabling the communication department to prosper

STRATEGY DEVELOPMENT RESEARCH METHODOLOGIES

Methods of developing research-based strategies include:

- Quantitative research (surveys) and qualitative research (focus groups) to uncover insights about media consumption preferences of stakeholders and the messages most likely to resonate
- Analysis of news outlets' published articles and social media channels to determine what topics they cover and how they cover them
- Media demographic audit to determine which media deliver the highest penetration among actual and potential customers, employees, and other targets
- Social listening — as a form of digital focus group or media analysis — to uncover insight about stakeholder interests, preferences, and behavior

- Analysis of journalists and influencers to identify target intermediaries to deliver key messages to key audiences
- Competitor analysis to gauge which strategies appear to be most effective among shared stakeholders
- Attribution analysis to identify which digital media and messages are most likely to drive click-through to the website (or competitors') and to track how people engage with the site (e.g., the pages they visit, the information they download and, in the case of e-commerce, the products and services they buy)

EXAMPLE:
RESEARCH-BASED STRATEGY LEADS TO THE RIGHT MESSAGING

A company is set to launch a new product to drive revenue for the company's second-half financials. Thanks to the communication team's social listening tools and traditional media analysis, the team can see security concerns are being raised around topics related to their new product. These insights are taken into consideration and alter the way the product is communicated before launch, and a security-focus is dialed up as part of the product benefits. Ahead-of-launch messaging is altered, and product benefits are re-ranked to highlight security. The communication team can report its role as part of the business outcome through predictive listening.

FOUR TACTICAL CREATION AND ACTIVATION

Tactics deliver strategic messages to the stakeholders most likely to respond affirmatively. Research helps to identify the channels — traditional and social media sources, spokespeople, influencers, events, partners, causes, and more — through which messages can be delivered to the target stakeholder in ways that are engaging and trustworthy. Tactical research is time-based and should be updated regularly to identify which communications vehicles offer the greatest likelihood for success at a given moment. Just as important, tactics must reflect the strategy and contribute to meeting or beating one's objectives.

WHY ESTABLISH RESEARCH-BASED TACTICS?

There are four reasons for establishing research-based tactics:

1

Research helps ensure that tactics are appropriate and will reach and resonate with target stakeholders.

2

Research-based tactics can save money that may have been spent unnecessarily if one were to create and implement tactics based solely on instinct and conventional wisdom.

3

Research that identifies which journalistic and social media sources, influencers, events, etc., will resonate most with stakeholders can inform future programs and campaigns.

4

Attribution analysis quantifies which digital tactics are most likely to deliver click-through responses as target audiences engage directly through the sales funnel.

TACTICAL CREATION RESEARCH METHODOLOGIES

Methods of developing research-based tactics may include:

- Surveys, focus groups, or polls with stakeholders to determine the best channels, sources, influencers, etc.

- A/B testing to compare performance differences in two or more versions of a tactic/message*
- Influencer analysis to identify which individuals would best serve as spokespeople to resonate or engage with stakeholders (including through a network analysis)
- Secondary research about stakeholder preferences (i.e., market research, syndicated research)
- Media content analysis to assess tactical performance before, during, and after campaign activation
- Digital attribution analysis to determine the platforms, events, spokespeople, or content with which the stakeholder tends to engage

EXAMPLE:

WEB AND SOCIAL ANALYTICS INFORM CREATION OF TACTICS

A communication professional at a technology company used web and social analytics to determine which blog posts, pages, content, topics, and messaging the company's target stakeholder engages with most in the form of visits (including return), views, likes, comments, time spent, and downloads. Through the organization's e-newsletter, website, and social media platforms, she also created a poll to ask stakeholders about what content they were most interested in seeing and whether they would use a mobile application if the organization created one. The communication professional took the data to her leadership team and suggested the organization invest in creating a mobile application for its target stakeholder as part of its new communication campaign. A team at her company developed the application, which features content that aligns with the type of content users engage with on the organization's website and social media platforms. In the first few months of the mobile application's launch, it had more than 18,000 installs. Using research to inform tactical creation led to stakeholder interest and engagement.

In sum, research grounds the natural desire for purely creative activation based on what's "edgy," "disruptive," and "cutting edge." Be all these things, but make the most of creativity by designing programs and activities that focus resources while supporting strategy and contributing to the achievement of measurable objectives.

** A randomized experiment with two variations, A and B*

QUESTIONS EVERY COMMUNICATION LEADER SHOULD ASK

1. **How well do you understand your business and communications landscape?**
   a. Which research did you apply to make your assessment?
   b. How well is your landscape represented by data?
   c. To what degree have you contextualized for planning and strategy development?
2. **To what degree are your communications objectives specific, meaningful, action-oriented, reasonable, and measurable?**
   a. Do they reflect outputs, outtakes, and outcomes, including business results?
   b. Do your objectives contain specifics on "what you want to achieve" "among which audiences," "by how much," and "by when?"
3. **To what extent does your targeting and positioning strategy:**
   a. Reflect the preferences and needs of your target audience?
   b. Align with the messages your organization can deliver credibly and compellingly?
   c. Penetrate the communication channels your target audience finds involving and credible?
   d. Differentiate your organization from the competition?
4. **To what degree does research guide tactical decision-making?** How present is "conventional thinking" in your choice of campaigns, spokespeople and sponsorships? **Are you ready for breakthrough thinking while mitigating the potential for risk?**
5. **How well does your evaluation match up with your original objectives?** Do they link to outputs, outcomes, and outtakes, including business results? **Are your performance measures aligned to the business?** Are you able to augment your KPIs with actionable insights and strategic guidance?
6. **Does your communications cycle enable refinement over time?** Do data, analysis, and evaluation guide continuous improvement going forward (or do they simply reflect the past)?
7. **How well does the schema of my communication strategy resonate with my functional peers in finance, marketing, sales, and operation?**

FIVE

EVALUATION AND CONTINUOUS IMPROVEMENT

As paid, earned, shared, and owned media now form the playbook for public relations, the work of today's professional communicators often overlaps with other departments such as advertising or marketing. However, having disparate data from different departments and measurement platforms makes extracting insights messier and more difficult. Instead, breaking down the silos and creating an integrated measurement and evaluation system can provide clearer data about what stakeholders say and do. With an integrated research, analysis, and evaluation approach, departments share gained insight about stakeholders to best track the consumer journey and measure combined success. For instance, information about stakeholders can be found through web analytics, customer relationship management data, call center data, mobile app data, social media analytics, blogs, news, forums, investor reports, and especially in the big and "little" data that companies collect as technologies increasingly become more sophisticated. Managing the data effectively and holistically ensures a more methodical and simpler process. While CCOs and public relations professionals hold significant levels of control to drive agendas forward on behalf of their employers, partnering with other departments elevates the likelihood for success with the campaign and the organization.

Once data (quantitative or qualitative) are collected, data analyses determine what the results mean, how well they reflect the success of the program, and how to improve moving forward. The purpose of evaluation is not celebration but optimization. One might ask: *What does data tell us about the stakeholders? Do these data indicate the messages are resonating with stakeholders in the optimal way? What are people saying* *about the organization? Are there underlying factors that may be influencing the data? What should be changed moving forward?* It is not enough to simply look back at the end of a program or campaign and evaluate whether it was successful. Public relations evaluation is a cyclical process that requires real-time and "right-time" monitoring so that one can use research-based insights to inform and improve a program or campaign (which is why some models of public relations use the acronym EROPE* rather than just ROPE [9], emphasizing evaluation as a continuous process). It is not the quantity of the data gathered but rather the quality of the insights extracted and the degree to which the program delivered on its objectives that make research-based evaluation meaningful and worthwhile.

Continually measuring progress, evaluating why and how strategies and tactics succeed or fall short, and refining those strategies and tactics based on data-informed decisions provides intelligence to help communicators improve public relations performance and demonstrate the value of public relations.

This ongoing process is based on different cadences for different objectives, metrics, and KPIs (See page 27 for overview table). Typically, these range from "always on" KPIs around specific programs, initiatives, and activities that may be reviewed or reported daily or weekly (e.g., web, content and media metrics) to more macro organizational outcome measures (e.g., reputation, brand equity). These may be collected on an ongoing cadence, but are typically formally reported less frequently (e.g., annually or bi-annually), and more likely tied to specific C-suite KPIs and annual planning processes.

Organizations with more established business cases/rationales for the more macro organizational outcome metrics tend to cover a broader swath of stakeholders (e.g., customers, prospects, employees, policy makers, Investors, NGOs/advocacy groups/think tanks, the community, supply chain, business decision makers (and in healthcare, patients, caregivers, nurses, pharmacists, physicians, hospital executives, and payers) on a more ongoing cadence (e.g., some macro KPIs may be reported on a quarterly basis, lining up with, for example, quarterly financial reporting).

In addition to evaluating for continuous improvement, a critical part of being a strategic counselor to organizational leaders is to speak their language, which means packaging and reporting data in a clear, consistent manner. Messages must be translated efficiently. Organizational leaders often ask, "So what?" Professionals must communicate the impact the work is having on the business whenever possible. Though new technology (such as artificial intelligence) will make measurement more efficient and precise, the human aspect of being able to analyze, communicate, and consult the meaning behind the data is still vital.

** Evaluation-Research-Objective-Program-Evaluation*

RESEARCH AND EVALUATION REPORTING CADENCE TABLE

	ANNUAL	MONTHLY/ QUARTERLY	DAILY/ WEEKLY
RESEARCH & INSIGHTS PRIORITIES	• Competitive business landscape analysis • Competitive communications audit • Brand & reputation baseline • C-Suite KPI reporting	• Emerging trend identification • Emerging risk identification • Emerging influencer identification • Scenario planning	• Imminent/existing issue or risk identification • Engagement opportunity identification • Program/content/ campaign optimization
PRIORITY METHOD-OLOGIES	• Secondary research/ materials review and synthesis • Internal executive interviews • Cross-stakeholder interviews/surveys *Additional Value Add:* • Integration of operational data (e.g. acquisition, retention)	• Media monitoring • Social monitoring • Website traffic monitoring • Wikipedia traffic monitoring *Additional Value Add:* • Expert/influencer network monitoring • Real-time surveys	• Media monitoring • Social monitoring • Website traffic monitoring • Wikipedia traffic monitoring *Additional Value Add:* • Expert/influencer network monitoring • Real-time surveys
KPIs	• Reputation • Brand equity • Brand valuation • Differentiation	• Awareness • Consideration • Sentiment trend • Share of voice • Issue/topic relevance and trajectory	• Story sentiment • Issue/event sentiment • Share of voice • Issue/topic relevance and trajectory

EXAMPLE:

DEUTSCHE POST DHL GROUP — INTEGRATED MEASUREMENT OF CORPORATE COMMUNICATION AND CORPORATE RESPONSIBILITY FUNCTIONS

At Deutsche Post DHL Group (DPDHL), the communication department concentrates on building reputation by influencing stakeholder perception while sustainability managers strive to balance the interests of stakeholder groups through dialogue and interaction. And as corporate communication focuses on generating media attention using mass media, corporate responsibility centers on tracking material issues through dialogue and exchange with smaller audiences. Recognizing that the two functions could learn from each other and have a mutually enhancing impact beyond their functional areas if they worked together, DPDHL Group established a systematic and comprehensive communication and responsibility management process. The integrated process consists of five steps: gaining insights; assessing and prioritizing; defining opportunities; reporting; and calibrating.

To gain initial insight about stakeholders, an anonymous online survey of 500 international stakeholders provided feedback on all aspects of responsible business management. An initial analysis of the survey provided insight about the topics and issues that are of particular interest to DPDHL's stakeholders, including innovation and future technologies, sustainable business strategy, respectful treatment of employees, and elimination of child and forced labor. The results of the analysis were also evaluated through personal dialogue with an internal network of representatives from DPDHL's Compliance, HR, Corporate Communications, Responsibility, Procurement and Security teams, as well as an external Sustainability Advisory Council made up of customer representatives and independent sustainability experts. Together, representatives from each department weighed the expectations of stakeholder groups against everyday business practices on one hand and the current status of scientific, political, and ethical debates on the other. This materiality analysis, combined with DPDHL's long-established practice of issues monitoring through public opinion research, allows the company to use internal and external stakeholder expectations as a compass that sets the course for long-term strategic positioning. The last two steps of the process focus on reporting of findings to create transparency with stakeholders and continued dialogue and engagement with stakeholders to gain additional, relevant insights.

The lesson of a combined communication and responsibility management process is that the traditional role of corporate communication can only be only one component of a broader-based resource. By taking advantage of both big and small data tools like media attention analyses (e.g., circulation, viewing quotas and clicks) and materiality analyses (e.g., stakeholder feedback, independent ranking lists, and certified quality assurance labels), corporate communicators can establish a solid resource to guide communications strategy and measure and evaluate its progress.

MAKING THE CONNECTION BETWEEN PR AND BUSINESS PERFORMANCE

Communication research, analysis, and evaluation enable the public relations function to properly quantify its unique contribution in ways that are much more difficult in its absence. For the purposes of this paper, there are three primary ways by which communicators impact business performance:

1. **Efficiency by doing more with less and for less:** The most common of all ROI elements — research, analysis, and evaluation help focus communication resources on the strategies and tactics with the highest potential. Consider the simplest measurement for evaluation, "clip counting." If a $1,000 budget yields 1,000 stories, then the cost is $1.00 per story generated. Research, analysis, and evaluation would inform the communicator's ability to generate 2,000 stories for the same budget, thereby increasing efficiency and magnifying the yield. While communicators make efficiency decisions every day, they don't usually consider them as contributions to the bottom line.

2. **Revenue generation/Behavioral change** is the most attractive of ROI possibilities. Three approaches enable communicators with data to connect their activity with behavioral change including purchase and revenue generation:

    o Attribution analysis can track consumer click-through from earned media mention to e-commerce purchase, or connect a newspaper story to a government, non-government, and nonprofit outcomes such as compliance to improve public health, or reduce road accidents, for example

- Market mix modeling pools PR data along with marketing and other data streams to derive a relative sales contribution
- PR in isolation requires that a public relations activation occurs without any other form of support

3. **Avoiding catastrophic cost:** While public relations is rarely the root cause of a crisis, the function often takes center stage to represent the organization when crises occur. Research, analysis, and evaluation can help organizations to plan and monitor their response and assess the degree to which it mitigates or eliminates risks. Even before a crisis occurs, communicators can maintain data-informed "scenario" analyses, which provide insight into which responses are most likely to resonate positively if and when a crisis emerges.

The concept of return-on-investment in public relations, including the preceding three bullets, is one that continues to generate hype, confusion, and alternative approaches. We recommend the additional readings featured in the Appendix.

Partnering with other departments and teams within an organization allows for the creation of new perspectives that benefit the communications function as well as other groups within the organization including marketing, human resources, product development, and others to help communicators take a more holistic view of the stakeholder journey. While providing data and insights to the enterprise, the communication function should also work with the appropriate parties, such as the CTO and CIO, to help develop systems and deploy technologies that benefit the department in general and with its research, analysis, and evaluation tools and processes in particular.

EMERGING TRENDS

There are several emerging trends that are critical for communications leaders to stay in front of:

- **Real-Time Surveys:** Communicators now take advantage of ongoing/real-time surveys as an additive tool for evaluating perceptions of their organizations to tie those perceptions to specific campaigns/programs and marketplace events (e.g., competitor announcements, issues/risk events). The solutions in this space range from syndicated platforms including thousands of brands to hyper-custom approaches that look at multiple stakeholders, including internal databases/lists (e.g., customers and employees).
- **Audience/Influencer Network Analysis and Monitoring:** Although media monitoring/analysis remains a foundational component for public relations and communications measurement, increasingly, monitoring and analysis also happen at the audience and influencer level. At scale, platforms and solutions in this space range from dedicated specific audiences (e.g., policy makers,

journalists) to bespoke audiences and influencers based on specific topics or areas of affinity (e.g. cyber security, early adoption of health and wellness tools/techniques, fantasy football).

- **Digital Advertising Impact Applied to Earned Media:** Digital advertising impacts measurement, which allows public relations professionals to apply similar attribution technology to integrate PR and marketing through impact data. Professional communicators and marketers inform one another's programs and content so that PR and marketing work together to optimize exposure more efficiently. By tracking exposure and specific actions/behaviors (e.g., like, share, go to website, sign up for newsletter, directly inquire about product/offering, employment, or policy perspective), marketing and communications direct resources where they drive the best business outcomes most efficiently.
- **Brand and Reputation Valuation:** In 2019, the first globally recognized standard for brand evaluation was ratified through the ISO (International Organization for Standardization). Read below for more details and link to the ISO standard.

BRAND & REPUTATION VALUATION: ISO 20671

Brand Valuation — modeling the financial value and impact of brands and reputations — has historically been a murky territory for marketers and communicators. The discipline is highlighted by select high profile indexes (e.g., Interbrand's Most Valuable Brands), but mostly still surrounded by skepticism due to high costs and a lack of transparency into proprietary valuation processes. There is also inconsistency in financial requirements for reporting valuations (e.g., a valuation only needs to be reported around a merger, such as Kraft Heinz, or an acquisition, such as P&G's purchase of Gillette, but not for any organically grown brand, for example P&G's Tide). Due to their real world financial implications, these valuations are becoming a more consistent conversation in boardrooms, and increasingly critical business asset to understand, measure, and manage (e.g., Kraft Heinz wrote down $15B in its "Brand Value" Asset, causing an ~$17B drop in its market capitalization).

To address the skepticism, a group of leading global practitioners and academics have developed a fully transparent and auditable framework, which was officially ratified as a global standard in 2019, as ISO 20671. More information about the standard can be found here: https://www.iso.org/standard/68786.html

COMMTECH TOOLS FOR ENTERPRISE RESEARCH, ANALYSIS, AND EVALUATION

Communication technology or "CommTech" can be helpful in enabling the professional communicators to act at the speed of business. Technology delivers the data upon which decisions are based, often at low or no cost. However, the technology in research, analysis and evaluation is limited. While 'tools" offer speed and accessibility, they require human resources with sector expertise and statistical acumen to manage the tools, interpret the data, and uncover actionable insights to inform the entire communications continuum described here. Beyond "real-time," top communicators must consider "right time," especially when the stakes are high. Common research, analysis, and evaluation tools include:

- **Web analytics tools:** Google Analytics tracks site visitors, determines where they come from and how long they stayed connected, and provides an understanding of how visitors interact with website content.
- **Measurement tools like SEO (Search Engine Optimization) and PPC (Pay Per Click):** Reveal stakeholder interests by identifying the most significant keywords. These tools aim to optimize an organization's presence on search engines.
- **Customer relationship management (CRM) and customer mapping tools:** Trace the sales cycle in every phase to enhance customer relations and performance.
- **Social listening tools:** Track brand mentions, social media conversation about the organization and its competitors, peers, and opposition, often in real-time.
- **Call tracking solutions:** Measure the flow of phone calls from customers and prospects, which provide information on origin, duration, level of interest. Calls can even be compared with behavior change, such as appointment generation, ticket sales, or purchases.
- **Marketing automation:** Assists with marketing tasks, such as generating automatic emails. The best marketing automation platforms include metrics and analysis systems as an integral part of their structure and are able to produce ad hoc statistical reports and analyses.
- **Intelligence automation:** Monitors stakeholder preferences, keyword searches, voice, interests, etc., which enable the user to create targeted, personalized content for target audiences.
- **Attribution technology:** Determines click-through on digital earned media content by repurposing advertising technology for public relations. Once identifying a click on an individual article, the technology follows the media consumer's path anonymously to track their digital footprint from media outlet to website, review site, and more. The technology also provides detailed demographics and firmographics to quantify who said what, to whom, and to what effect.
- **Automated market mix modeling:** Enables communicators to conduct a do-it-yourself version of sophisticated statistical analysis more quickly, inexpensively, and more frequently to determine the relative performance of each active agent in the marketing and communications mix.
- **Reputation trackers:** Track reputation from a 360° stakeholder perspective with a variety of internal and external metrics on multiple dimensions such as employee engagement, reputation in the marketplace, etc.
- **Machine-learning text analysis software:** Generates insights from unstructured data, such as comments in response to open-ended questions in surveys, focus group transcripts, online

comments, and correspondence; such as e-mails, letters, and complaints, etc. People express their views in words more than they do in numbers.

- **Voice to text (VTT) software:** Transfers digitally recorded voice, such as calls to call centers to text for analysis using text analysis tools.
- **Automated media monitoring and content analytics:** Monitors corporate and brand references in digital media across consumer, trade, and financial media.

CONCLUSION

As the communication industry landscape continues to evolve, the role of communication leaders evolves with it to elevate the organization, mitigate risk, and drive positive business performance. Communication programs and campaigns rooted in research and data help professionals do their jobs more effectively and efficiently to meet the needs of the organization. Investing the resources to implement measurement, research, and evaluation into each of the five steps of the of the communication lifecycle (landscape analysis, objective setting, strategy development, tactical creativity, and evaluation for continuous improvement) aligns the direction for communication teams, creates partnerships with other departments, reduces uncertainty, and allows for unparalleled insight about stakeholder attitudes, opinions, and behaviors. In summary, research, analysis, and evaluation require organizations to listen with intent. A constant feedback loop of data and insight allows the creation of communication programs, campaigns, and initiatives that reach and resonate with stakeholders for the benefit of the organization and, ideally, with the stakeholders themselves.

ADDITIONAL RESOURCES

- IPR Measurement Commission: https://instituteforpr.org/ipr-measurement-commission/
- Need for standards: See AMEC Barcelona Principles 2.0
- Need for integration: See AMEC Integrated Evaluation Framework
- Need to write measurable objectives: See IPR Guidelines for Setting Measurable Objectives
- Need for common language: See IPR Dictionary of Public Relations Measurement and Research
- Need to better understand metrics: Paine Publishing's Guide to Commonly Used Metrics
- Need additional reading: See AMEC's "Readings, Guides, Tools, and Resources for Measurement and Evaluation of PR and Strategic Communication"
- Need for evaluating public relations: See Evaluating Public Relations
- Need for alternative approaches to PR-ROI: Principles for the Use of Return on Investment, Benefit-Cost Ratio and Cost Effectiveness Analysis in Public Relations

TOP TEN "MUST READS" ON EVALUATION OF PR AND COMMUNICATION

By Dr. Jim Macnamara

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The above list is subjective by the author, but based on the criteria of (1) selecting mostly recent texts and guides; (2) selecting texts and guides that are forward-looking rather than discussing problems or criticizing; (3) selecting mostly texts and guides that are available free online; and (4) including (lastly but not least in terms of importance) texts that offer a comprehensive guide.

APPENDIX

Definitions of Metrics

Audience: the number of viewers and listeners exposed to broadcast and cable content

Circulation: Number of copies of a publication as distributed (as opposed to read)

Clickthroughs: Metric of how many visitors to a webpage go beyond the initial webpage and into site content [10]

Cost per click: Cost-per-click (CPC) bidding means that you pay for each click on your ads. For CPC bidding campaigns, you set a maximum cost-per-click bid - or simply "max. CPC" - that's the highest amount that you're willing to pay for a click on your ad [11]

Cost per engagement: With cost-per-engagement (CPE) bidding, advertisers only pay when users actively engage with ads. For example, advertisers pay for lightbox ads (a type of expandable ad that can expand to a very large size) on a CPE basis, which means that publishers generate earnings from lightbox ads when users choose to engage with the ads, e.g., by hovering over them for two seconds to expand the ads. [12]

Mentions: An output or outcome consisting of counts of incidents of a company or product or person appears in the media, one mention constitutes a media placement; the number of times a tweet, blog, or other social media output is talked about by other social media users [10]

Reach: A metric estimating the size of an stakeholder exposed to a communication based on some audited system (traditional media); the number of unique social media mentions divided by the total mentions (social media) [10]

Readership: Number of people who actually read each issue of a publication, on average [10]

Sentiment: A metric that assesses and determines the tone of a public relations output; a ratio of positive to negative; typically evaluated as positive, neutral, or negative [10]

Share of voice: A measurement of total coverage devoted to earned media coverage to a particular industry or topic as analyzed to determine what percent of outputs or Opportunities to See (OTS) is devoted to a client or product; also known as “share of coverage” [10]

END NOTES

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[6] PRNEWS, 2014 Mark Weiner. Retrieved from https://www.prnewsonline.com/four-years-later-little-traction-for-barcelona-principles/

[7] **Attribution** is the analytical science of determining which communications and marketing tactics contribute to sales or conversions. The goal of attribution is to determine which channels and messages had the greatest impact on the decision to convert, or take the desired next step. At the same time, the attribution analysis captures demographics and firmographics to uncover who clicked on a story and what they did as a result.

[8] Impressions typically measure the circulation and audience size of the media outlet that features the article. It does not measure awareness or retention of the information as "awareness" and "retention" are human processes. "Media awareness" is a common but flawed reference along the same lines.

[9] The acronyms are based on the following: R=Research; O=Objectives; P=Planning; and E=Evaluation

[10] As defined in Stacks, D. W., & Bowen, S. A. (2013). Dictionary of Public Relations Measurement and Research. Retrieved from Institute for Public Relations website:
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[11] As defined by Google Ads: https://support.google.com/google-ads/answer/116495?hl=en

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