

Social Media Measurement Guidance

March 2011 edition



Introduction

Basketball legend LeBron James holds the record as the youngest player in NBA history to score 15,000 regular season points, and James has averaged 27.8 points, 7.0 assists and 7.0 rebounds per game for his career in the regular season. The 6ft 8in 'guard' was considered the most valuable player in the game in 2009 and 2010.

Great metrics? Interested? Would you have him on your team? If so, you're not alone, as the intense traditional and social media interest was testament when James' contract with Cleveland expired mid-2010.

... the metrics in which you will be most interested, the metrics that will prove to be most valuable to you, depend entirely on what you have set out to achieve.

But of course, you might not be interested. Indeed, perhaps we picked basketball because it isn't commonly followed in the UK, in which case the numbers above mean next to nothing to you. You might run a football team, requiring very different 'guard' talents. Or a Formula 1 team, in which case James' height and weight might just be disadvantageous. Or perhaps you run a public relations team come to that, and the metrics here tell you nothing of James' talents in crafting communications strategy or creating outstanding tactical ideas.

In other words, the metrics in which you will be most interested, the metrics that will prove to be most valuable to you, depend entirely on what you have set out to achieve. It appears obvious when you look at it like that. And while it may be tempting to treat public relations as homogeneous as basketball with a common, convenient set of metrics with which pundits can draw easy comparison, it is in fact more like the world of sport in general. The suitability of metrics is contingent upon such things as the sport in question, the competition, your choice of undifferentiated structure and approach, and your design of strategy – those aspects at which you seek differentiated advantage.

CIPR's Research, Planning and Measurement Toolkit

The CIPR reissued its Research, Planning and Measurement Toolkit in October 2010 – “a practical guide to research, planning and measurement – what it is and how to do it.” Except the CIPR's social media measurement group decided to play cautious and reserve its contribution until March 2011.

You see, 2010 was a noisy year for social media measurement, rounding out as it did a decade that could surely go down in history as the social media decade. From the blogging explosion in the early part of the decade, through Friendster, Second Life and MySpace, to iPhone and Android apps, Facebook's almost 600 million users and the many millions getting all a Twitter. With a later sprinkling of Foursquare and Groupon.

We have already passed the point at which the word "consumer" no longer seems entirely appropriate, for social web participants produce, share, curate and publish as well as consume, fuelled in no small part by the massive improvement in mobile device capabilities since the advent of the original iPhone in 2007. If your marketing and communications

objectives encompass such possibilities, if they pivot around engagement perhaps rather than just plain old consumption, then we need to be looking at metrics of engagement not just consumption, awareness or reach.

The public relations professional has had much to keep on top of and, to continue with our sporting metaphor, one might say the choice was between dipping your toe in the water and diving whole-heartedly into the pool. It was only the rare practitioner that got as far as time trials and scientific study of stroke technique.

2010 also witnessed some valiant attempts at crystallising this scientific study – to explore and define best practices in social media measurement. The International Association for Measurement and Evaluation of Communication (AMEC, www.amecorg.com) led the pack, and the CIPR Social Media Measurement Group particularly wanted to wait until AMEC ran its London Conference in November 2010 before publishing this guidance.

The Barcelona Principles

The CIPR Toolkit references the Barcelona Principles enshrined at the 2nd European Summit on Measurement, hosted by AMEC and the Institute for PR during the summer of 2010 (see the CIPR President's blog post at <http://bit.ly/barcprinc>). For your convenience, the principles are listed again here:

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

The summit's 200 delegates and five of the industry's leading PR and research organizations agreed to these principles by a very convincing majority vote, though it's widely understood that the third and fourth principles were the most controversial. We all knew it wasn't sufficient to knock something down (AVE – Advertising Value Equivalence), as much as it deserved it, without trying to build something else in its place – and the profession was far from consensus regarding how to quantify social media success. AMEC's US Agency Research Leaders Group took the lead to resolve these two questions prompted by Barcelona:

- What are the “valid metrics” to replace AVEs?
- How do you get started in measuring social media, and what are the relevant metrics?

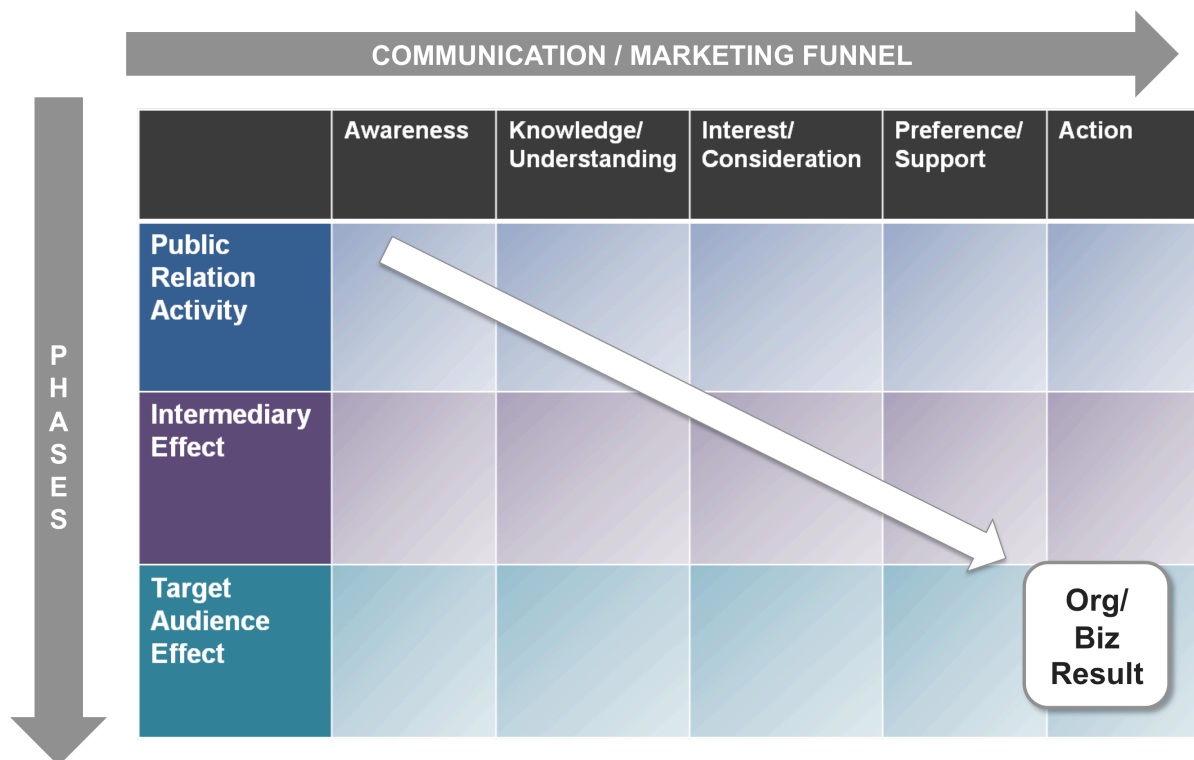
The task force results were previewed at IPR's 9th Annual North America Measurement Summit and then presented in depth at AMEC's November 2010 London Conference. We discuss the AMEC "valid metrics" approach below, and the CIPR's input to these deliberations. First however, it's worth emphasising the 7th principle too, particularly as it's all too easy to gloss over it.

Transparency means no black boxes. Period. You must be able to see the query you are giving the analytics service and its translation and machining of it. You must be able to export the query, data and associated analyses somehow. You must understand exactly how the service is working, to the point of appreciating the approaches to manifest (intended) and latent (recognised) analysis, and natural language processing. Without such insight, you simply have neither transparency or replicability. As Philip Sheldrake pointed out in a June 2010 blog post and New Media Age article, "[Making sense of social analytics](#)", web analytics went through this same progression 10 years earlier.

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Enter the Matrix: AMEC Outlines "Valid Metrics" to Replace AVE

Ruth Pestana, Worldwide Director of Strategic Services from Hill & Knowlton and chair of AMEC's taskforce on valid metrics, presented the AMEC valid metrics approach at the London Conference. The thoughtfully developed grid lays out the phases of public relations activity along the y-axis and the so-called marketing funnel along the x-axis. The objective is then portrayed as that which lies at the final stage of PR activity, the "target audience effect", and the final stage of the marketing funnel, "action". This destination cell is labelled "Organisation / Business Result".



Our group endorses the direction this work is taking the industry, particularly the determination to accrue valuable and practical meaning to metrics by designing them to relate as closely as possible to intended organisational goals. However, we have some concerns regarding the similarity of the axes here. Specifically, what different meaning is conveyed by “target audience effect” if it’s not an “action” of some sort?

Social media measurement is a discipline, not a tool or a “single metric”.

Tim Marklein continued where Ruth’s presentation left off. Tim is Executive VP of Measurement & Strategy for Weber Shandwick, and chair of AMEC’s taskforce on social media measurement. Here is the content of Tim’s presentation on key metrics, issues and guidelines for social media measurement, with some commentary from our group in parentheses:

Slide 2 – Prior Work: Barcelona Principle #6

- Social media measurement is a discipline, not a tool or a “single metric”
- Organizations need clearly defined goals and outcomes for social media (that can be meaningfully allocated to extant business functions)
- Media content analysis should be supplemented by web and search analytics, sales and CRM data, survey data and other methods
- Evaluating quality and quantity is critical, just as it is with conventional media
- Measurement must focus on “conversation” and “communities” not just “coverage”
- Understanding reach and influence is important, but existing sources are not accessible, transparent or consistent enough to be reliable; experimentation and testing are key to success.

Slides 3 and 4 – Social Media Task Force Guidelines

Recommendation #1. Focus on Outcomes

- Need to define outcomes and goals in advance
- Can’t define or manage purely within PR / communications silos
- Outcomes will likely span multiple business goals (and you should map outcomes to suggested actions – avoid the awkward “so what” challenge)

Recommendation #2. Starter Set of KPIs

- Basic quantitative data is easy to measure – but not terribly valuable
- Need to get into more quality and context, similar to media analysis
- Fits into “valid metrics” grids from post-AVE task force (see sample below)
- Recommendation #3. Influence Rating / Ranking

- “Influence” and “authority” are domain-dependent (e.g., an individual may have authority in British fashions but none in tractor racing)
- “Influence” and “popularity” aren’t the same (see Brian Solis' blog post: "Please Repeat: Influence is not Popularity")
- Influence is multi-level, online and offline
- Influence can change over time based on many factors

Recommendation #4. Content Sourcing

- Not all sources are created equal – know what you’re getting / not getting
- Garbage in, garbage out – critical challenges for measurement
- Industry needs transparency from vendors on sourcing, quality

Social/Community Engagement	Awareness	Knowledge	Consideration	Preference	Action
Public Relations Activity	<ul style="list-style-type: none"> • # assets created • # blog posts • # videos/podcasts • # Facebook posts • # Twitter posts • # blogger events • # bloggers briefed • # community site posts and events • Offline community events/speeches 	<ul style="list-style-type: none"> • # assets created • # blog posts • # videos/podcasts • # Facebook posts • # Twitter posts • # blogger events • # bloggers briefed • # community site posts and events • Offline community events/speeches 	<ul style="list-style-type: none"> • # assets created • # blog posts • # videos/podcasts • # Facebook posts • # Twitter posts • # blogger events • # bloggers briefed • # community site posts and events • Offline community events/speeches 	<ul style="list-style-type: none"> • # assets created • # blog posts • # videos/podcasts • # Facebook posts • # Twitter posts • # blogger events • # bloggers briefed • # community site posts and events • Offline community events/speeches 	
Intermediary Effect <i>(Media, Bloggers, Influencers, Customers, etc.)</i>	<ul style="list-style-type: none"> • Owned media site visitors per day • Earned media site visitors/day • Social network channel visitors • # video views • % share of conversation • Site’s target reach by demographics • Prominence • Offline media impressions 	<ul style="list-style-type: none"> • X:XX time spent on site/channel • % share of conversation • Site surveys and feedback forms • Key message alignment • Expressed opinions • Accuracy of facts • Offline media impressions and messaging 	<ul style="list-style-type: none"> • X:XX time spent on site/channel • % share of conversation • Expressed opinions • # Facebook fans • # Twitter followers • # Retweets • # Comments • # Likes • # Linkbacks • Offline media inquiries 	<ul style="list-style-type: none"> • X:XX time spent on site/channel • Expressed recommendations • # Facebook fans • # Twitter followers • # Retweets • # Comments • # Likes • # Linkbacks • Offline media inquiries 	
Target Audience Effect <i>(Customers and Consumers)</i>	<ul style="list-style-type: none"> • Unaided awareness • Aided awareness 	<ul style="list-style-type: none"> • Knowledge of product attributes and features • Brand association & differentiation 	<ul style="list-style-type: none"> • Relevance (to themselves) • Requests for information • Event attendance • Advocacy 	<ul style="list-style-type: none"> • Attitude change • Brand preference • Stated intention • RFPs/RFQs • Product trials • Advocacy 	<ul style="list-style-type: none"> • Downloads • Leads/sales • Revenue • Market share • Cost savings • Advocacy

Where does this leave us?

The CIPR Social Media Measurement Group believes this moves the industry a little further forward, but not quite where we still need to be – a conclusion we know the AMEC team shares. This remains a work in progress. We analyse the situation in a little more detail in this section, and then present the CIPR’s take on social media measurement best practice, which we’re feeding back into AMEC as deliberations continue throughout 2011.

Our critique

The matrix helps move practitioners in the right direction, toward identifying metrics that are linked to intended organisational outcome. We've already pointed out that we're worried there's insufficient difference between the axes to warrant marrying one off with the other, and we intend to see if we can come up with other more productive options.

... as each marketplace is unique and as your organisation is unique, your strategy will be unique. And so, therefore, will be the suite of measures you design, deploy and manage by.

Perhaps the example metrics populating the matrix cells belie the shortfalls of the matrix as it stands today, specifically why so many of them repeat across so many of the cells? In other words, does this not challenge the useful distinction of one cell from its neighbours?

We are also concerned about the phrase "valid metrics" should it be taken by anyone to imply some kind of universal validation. There is no such thing in our opinion. Here's why.

Every organisation should have a mission (why we exist?), values (guiding behaviour), a vision (what do we want to be?), objectives (breaking down the vision) and strategy (how we intend to get there / achieve the objectives?). Given that measurement isn't just the detached collection, analysis and presentation of data but a powerful management tool in itself, a powerful way to align each employee's day-to-day activities with the strategy, this cascade must continue robustly, transparently and visibly. People perform as they are measured, so the measures must drive strategically important behaviour.

And as each marketplace is unique and as your organisation is unique, your strategy will be unique. And so, therefore, will be the suite of measures you design, deploy and manage by.

On re-reading Tim's presentation you can see that he and the AMEC team appreciate this of course. He refers to the example metrics as simply "starter KPIs" for example, and feels compelled to write "valid metrics" in quotes. We continue to use the expression here to indicate a metric that is considered to be worthy of consideration. So, for the avoidance of doubt, a metric may be valid in the generic sense but unsuited to your specific needs, just as the "assists" metric for James LeBron's performance is a valid metric, but not suitable if you're playing tennis.

Best practice – as we understand it today

The CIPR's Toolkit very much applies to social media and, well, non-social media (if such a thing prevails) and all other aspects of public relations activity. Perhaps this notion of universality is lost because we expect different things of 'social' / 'digital'. Perhaps because social media is the most nascent channel for dialogue with our publics and therefore the one most shrouded in awe, unknowns and confusion.

Here are five common myths it's worth taking time to dispel:

Myth 1: We can measure everything digital precisely and instantly.

Jim Sterne puts it like this: "The world of online marketing has been suffering from a delusion of precision and an expectation of exactitude."

Firstly, most business isn't 'done' online. The ultimate outcome / action of which you aim to convince your publics likely involves some non-digital action such as getting people to your high street store, or changing their preferred coffee shop, or test-driving a particular make of car, or recommending the movie to mates down the pub, or prescribing one pharmaceutical drug over another, or revising their approach to recycling or their regard for your stock or charitable cause.

Secondly, even when the outcome does entail the unmistakable click of the "Buy now" button, how might one attribute this sale to all the touch points your new customer has had with your organisation and brand over the weeks or even years running up to that moment? Don't fall into the "last-click attribution" trap (and don't let your marketing colleagues take full credit for that last click, either, when PR likely had some impact along the way).

Myth 2: All digital metrics are useful.

Just because you can measure it doesn't mean you should. In our opinion, this myth has possibly been the biggest distraction on the road to best practice to date.

Myth 3: The new compound score everyone is talking about must be useful.

Innovations such as Technorati authority, Klout score and PeerIndex ranking appear sexy on first review, but they can only be useful to you if you understand them and they are relevant to pursuing a specific strategy. And the assertion here that you must understand them is no trivial point. In our experience, too few practitioners know what the numbers represent, nor then do they know how to interpret the quantities and ensure they are not misapplied.

This confusion can be fuelled by the purveyors of said indexes falling far short of a reasonable explanation of their machinations, either with an eye to maintaining trade secrets or perhaps lending their divinations more mystical attraction. In conclusion, one should always approach compound, proprietary measures with extreme caution, and always caveat any application accordingly. We're not saying they are useless, just that they are of no use if opaque, misunderstood or poorly applied.

Myth 4: One metric will do.

How useful is a speedometer without an understanding of the direction of travel? What use measuring calorie intake without quantifying exercise and other lifestyle variables? BP had a great year in 2010 if one tracks volume of mentions alone. One metric never suffices. You will need a balanced portfolio of metrics.

Myth 5: The more followers / friends the better.

The number of followers and friends indicates popularity, but as Tim states in his presentation above, popularity isn't the same as influence. Moreover, taking the number of followers / friends in isolation does not account for context, nor the number of faux followers and friends (for spam-like purposes).

Best-practice process for selecting and defining social media metrics

Let's remind ourselves of the five-step process outlined in the CIPR Toolkit:

- Step 1. Audit – Where are we now?
- Step 2. Setting measurable objectives – Where do we need to be?
- Step 3. Strategy and plan – How do we get there?
- Step 4. Measurement and analytics – Are we getting there?
- Step 5. Results and evaluation – How did we do?

Just like any other component of your PR strategy then, when it comes to social media, we must build an appreciation for what constitutes a measurable objective (step 2), then determine how to measure that, and then understand how exactly this metric should be wielded in advance of step 4.

When it comes to identifying the most appropriate social media metrics, we recommend that you define what exactly it is you mean by “most appropriate” in each instance. Even defining this in ideal terms can help achieve greater understanding of the matter at hand and help you define the eventual realistic metric and appreciate its shortcomings or limits when compared to the ideal.

You are then in a position to identify the selection of valid metrics that suit your needs, before tailoring / customising them precisely to your purposes. The bibliography here contains books featuring lists of valid metrics to help you here and you should document and communicate the rationale for and the shortcomings or limitations of the defined metrics to make sure everyone on your team is aligned. The last thing you want, having gone to this level of professional diligence, is for some over-keen colleague to misinterpret or misapply the measurements in Step 4.

Lastly, as social media is a fast-changing landscape, we recommend you apply an owner and best-before date. This date stipulates the point at which the current assumptions should be considered to be obsolete and the point at which the owner should review the whole thing.

In summary, we have broken the CIPR Toolkit's Step 2 into component steps:

- 2.1 Define your measurable objective
- 2.2 Define your benchmark set – comparative / relative
- 2.3 Define the ideal metrics
- 2.4 Identify candidate metrics that combine to best meet your ideal definition – don't try and make your metrics universal across the organisation, but apply different metrics for different audiences
- 2.5 Tailor each one to your specific needs, recognising its shortcomings / limits
- 2.6 Document these steps to make the process auditable and more easily reviewed
- 2.7 Set a review date and owner.

By undertaking this process, you can assure your line manager and board that high attainment of the selected metrics indicates a higher contribution to the achievement of the organisational objectives. What more could they ask for?

Return on investment

Oh yes, they could ask you to quantify the financial return on investment in social media. You cannot blame anyone for making such a request of you, but should they persist after reading the CIPR Toolkit and these guidelines, then one can only conclude that they do not appreciate how your PR strategy contributes to organisational success. This in turn could imply that the strategy does not contribute to organisational success – or because it hasn't been clearly communicated, or it has been clearly communicated but the recipient still doesn't get it. Whichever, the challenge is then beyond the scope of these guidelines.

Investment in social media PR is, by definition, an intangible asset, and is no more or less quantifiable than any other intangible asset.

What we will say here is that any robust attribution of return on investment to a social media strategy or individual tactic is the exception and not the norm. If you have a relatively placid marketplace, and if you execute one strategy in isolation, and if you can correlate an uplift in sales with the timeline of the strategy, then an estimation of ROI shouldn't be too taxing. But these instances are far from common.

Investment in social media PR is, by definition, an intangible asset, and is no more or less quantifiable than any other intangible asset. What exactly was the ROI on that site-wide Windows upgrade, last year's training and development budget, the office refurbishment, the TV ads and the re-brand? World-class organisations understand how specific investments in intangibles contribute to organisational success because they excel at mapping the alignment of strategy across the organisation's operations.

Here's another way to look at it. Best-practice social media aims to build reputation through conversation and engagement. It aspires to Grunig's 4th model – two-way symmetric public relations. It underpins an organisation's drive to grow relational rather than merely transactional customers and stakeholders, and the customer's or stakeholder's life-time value cannot be attributed to one week, one month or one social media strategy.

If your organisation excels at strategy mapping and building customer / stakeholder relationships, approaching the measurement of social media according to these guidelines should be a slam dunk even Lebron James would be proud of.

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http://www.amecorg.com/images/public/barcelonaprinciplesforprmeasurementslidesfinal_22july2010.ppt

AMEC’s “PR Measurement Metrics: From Concept to Implementation Reality” proceedings, including the “valid metrics” and social media guidelines:

<http://www.londonmeasurementconference.org/downloads.html>

Institute for PR Measurement Commission’s “social hub” with commentary and background on the Barcelona Principles, “valid metrics” approach and related measurement discussion:

<http://www.iprmeasure.org>

More resources are maintained at:

<http://ciprsm.wikispaces.com/Social+measurement+resources>

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