Factsheet

Creating a Campaign Measurement Strategy

APPROVED BY IoIC PEER REVIEW PANEL

Please note this factsheet is part of a series on measurement and should be read alongside [‘Measuring Internal Communication – the basics’.]

What is a campaign measurement strategy?

A measurement strategy is a detailed plan for how you’re going to measure the effectiveness and impact of your communications. It goes into a lot more detail than you might include in a standard communication plan and is therefore most likely to be appropriate for a big campaign or change programme. A measurement strategy contains:

- A review of previous data and insights that might be relevant to the campaign
- Specific *measurement* objectives
- Detailed measurement activities you will do (surveys; polls, focus groups etc), and
- An explanation of how you intend to analyse and share your results.

Why is it important for IC professionals?

When an organisation is investing a significant amount of money, time and/or resources into a campaign, it is even more important to understand the effectiveness and impact of the communications. You want this to be about more than just how many people watched, clicked or attended.

You want to know:

DO THEY GET IT?	ARE THEY INSPIRED BY IT?	DO THEY GET IT?
KNOW	FEEL	DO

And importantly, we want to know what we can LEARN from the exercise to improve our future communications activities.

What does a measurement strategy include?

Desktop data review – learnings from previous campaigns

Before you start collecting any new data, review any existing data and insights you have from previous campaigns. Look for what you can learn from the data that will help you shape the new campaign:

- What type of content was most successful? What type of content was least successful?
- What format of content worked well? What format didn't work so well?
- Did you achieve your 'know, feel, do' outcomes?
- Which audiences engaged the most and least? Why?

Measurement objectives *(What are you trying to achieve by measuring?)*

Understanding and documenting **why** you want to measure your campaign, will help ensure you capture the correct data. Some common campaign measurement objectives might include:

- To measure the impact, reach and engagement with [the campaign].
- To learn what has worked well and what could be improved
- To learn the impact of [certain tactics] on [the outcomes you are trying to achieve]
- To get a view of engagement with the campaign by [market/grade/division]
- To provide recommendations for [further activity]
- To demonstrate the value of internal communications in supporting business outcomes.

Timings

You should plan to gather data and feedback throughout your campaign – not just at the end.

<u>Before the campaign:</u> Sometimes it might be appropriate to gather some baseline data before a campaign, so that you can track any improvements in what employees think, feel or do. For example, before running a big campaign to support the launch of a new intranet platform, you might want to measure what employees think and feel about the current intranet as a benchmark.

<u>During the campaign:</u> Gather data and feedback 'as you go' to assess whether you need to adjust your approach before the end of the campaign. That means reviewing your data as you go as well! If your campaign has a phased roll-out, for example, starting with leaders or managers, use their data and feedback to influence your remaining campaign activity (*This would mainly apply to large change programmes or long campaigns with multiple phases*).

End of the campaign: Gather data and feedback as soon as possible after the completion of activity whilst the campaign is still fresh – but allowing enough time for the impact to reach as many people as possible (especially if a cascade is involved).

Measurement activity ideas

There are many different ways you can collect data and feedback. Here are a few ideas, but always try and think of new and creative ways.

QUANTITATIVE	QUALITATIVE
Email opens, clicks and read times	Feedback from HR business partners / leads (*provide them with 2 questions to ask of leaders in their areas*)
Video views and duration of watching	Feedback from official employee reps / forums
Intranet views, likes, comments	Feedback from official networks / business resource groups
Viva Engage posts, views of comms posts, likes, comments and # uses	Capture verbatims at events (and in feedback surveys) – but *not just about quality of the event – ask about your 'know-feel-do' outcomes*
An online survey	Do some sentiment analysis on Viva Engage posts (% positive/neutral/negative)
A live poll in key events	Do a 'word cloud' question at events or in surveys
Number of attendees on a call / at a live event	Take photos of people engaging with your content (*these look great in reports – but remember to get their consent*)
Number of questions asked on a call / at a live event	Observational methods: Note down people's actions and responses when they interact with your comms.
A flip chart / poster wall survey at live events	Focus groups
Manager cascade feedback survey	One on one interviews / calls

The Measurement Framework *(Example used below: financial results campaign)*

This framework helps you to map out how you are going to measure each of your communications outcomes (i.e. what you want colleagues to know, feel and do) as well as how this links to the business goal you are supporting.

1. Start by articulating what the BUSINESS objective is. In the example below we are using the communication of a company's financial performance update as the campaign. The business objective behind engaging employees with the financial performance of the company – is ultimately to improve the performance of the company against the key financial metrics.

2. The next step would be to articulate the communications outcomes that will support this business goal – i.e. what you want employees to know, understand, feel or do.

3. The third step outlines **how** you will measure the communication outcomes – how you will gather the data you need to know whether you have achieved your outcomes or not. This could be one or more of the measurement activities listed above.

4. Next you need to think of **what** data you need to collect – this will be the specific questions you will ask or metrics you will gather.

5. Finally, you can set yourself a target score to achieve. This will help you to understand whether your results are 'good'. The easiest way to set target scores is to base them on previous scores from similar campaigns if you have this historical data.

Business Goal	Communi-cations outcome	Data sources	Questions to be asked / data gathered	Target score / KPI
E.G. Improve performance against key financial metrics	**KNOW**: *E.G. Employees understand where the company is performing well, and where there needs to be further focus.*	*E.G.* *1. Online survey* *2. Cascade feedback survey* *3. Viva Engage posts on team focus areas*	*E.G.* *<u>Online survey questions (Level of agreement with following statements):</u>* - *My colleagues understand which of the company's core financial metrics we are performing well against* - *My colleagues understand what we need to focus on as a business in the next 6 months to improve our performance* *My manager facilitated a conversation about our financial results with our team (yes / no/ not sure)*	*E.G.* 3.4/5.0 4.2/5.0 65% yes

			<u>*Cascade feedback survey questions (Level of agreement with following statements):*</u> - *My manager explained how our work has contributed to the financial performance of the company* - *My manager explained what our team needs to focus on over the next 6 months* <u>*Viva Engage Campaign*</u>*: 'Team pledges' (Share a photo of your team discussing our financial results and what one thing you will be focusing on over the next 6 months to improve our company's performance using the hash tag #H1teampledge)*	4.5/5.0 3.7/5.0 100 photos shared 200 uses of the #
	FEEL: *E.G. The company acknowledges my contribution to the performance of the business*	*E.G.* *Online survey*	*E.G.* <u>*Online survey question (Level of agreement with following statement):*</u> *I feel like my contribution to the performance of the business has been acknowledged*	4.0/5.0
	DO: *E.G. Reduce spend on travel and expenses – to reduce end of year costs*	*E.G.* *1. Online survey* *2. Cascade feedback survey* *3. Finance team*	*E.G.* <u>*Online survey question:*</u> - *I'm aware of the need to reduce spend on travel and expenses (Yes/No/Not sure)* *Business Metric:* *You could also track the actual spend on travel and expenses to see if it reduces.*	75% yes 15% Reduction

Analysis and Insights

Once you have collected your data – as mapped out in your framework – you will need to analyse it to identify how effective your communications were, the impact you had on the business goals and what you can learn going forwards. Two simple ways to analyse your data include:

1) Look at the data over time – Simply note the scores for each question. Ask yourself:

- Are they higher, lower, or about what you expected?
- Can you compare them to historical data or averages?
- If there are any significant outliers in the data – investigate why this is. Do some follow up interviews or a focus groups.

2) Look at the data by 'segments' – You can sometimes extract more interesting information from your data if you look at it separated out into groups. For example – perhaps respondents in customer-facing roles responded differently to those in back-office roles? To do this basic level of analysis – you will need to know the appropriate demographic information (which you should build into the design of your research upfront):

- ***Grade*** *– which is the least and most positive? Which is the most and least engaged with your content / activity?*
- ***Location****– which is the least and most positive? Which is the most and least engaged with your content / activity?*
- ***Department*** *– which is the least and most positive? Which is the most and least engaged with your content / activity?*
- ***Outliers*** *- If there are any extremely low or high scores* - ask yourself why this might be. Follow up with some one-on-one interviews or focus groups to find out why.

If you are able to – always try to capture some demographic data with your measures and metrics e.g. Grade, Function/Division, and location/country. Check with HR what level is appropriate for your organisation.
This will enable you to segment your results and look for usable insights.

BE CURIOUS - It is by being curious about 'why' the results are the way they are – that you can start to learn and create new hypothesis you can test in further research. All of this builds your 'data-mindset' and makes you a more strategic thinker and communicator. If you'd like to learn more about how to do this – sign up for the IoIC's Data for Internal Communicators course.

Reporting

Thinking about how you will present your data and insights BEFORE you finalise your measurement approach, means you won't miss capturing that 'killer quote', brilliant photograph or buzz in the room through a word cloud.

Key elements of a campaign evaluation report:

- **Dashboard** – A one-page summary to use with stakeholders – that describes the overall effectiveness of the campaign, key insights and recommendations.
- **Methodology** – A brief explanation of how you captured your data (survey response rates and timings etc).
- **Detailed results –** By business goal/communication outcome – share both quantitative and qualitative results, measures and metrics for each outcome. Comment on whether you feel the outcome has been achieved or not.
- **Analysis insights –** What you learned from looking at your data by market, grade, location etc. Did you find any interesting correlations? Which was the strongest/weakest business unit or management grade?
- **Recommendations** – What are your next steps? What will you stop, start or continue?

N.B while it's tempting to share all your data in your measurement report this is not often the best idea. Try to focus on demonstrating the impact of your work (i.e. the achievement of your outcomes) and what you have learned (the insights from your data analysis). Everything else is noise and can be shared in the appendix.

Barriers to consider

1. **Timing** – Consider whether it's appropriate for you to be doing research about your communications right now. Be considerate of how employees are feeling. Avoid running research at the same time as bad news is being shared, significant increases in workloads, busy periods etc.
2. **Survey fatigue** – You do not have to survey everyone all the time. Get used to doing small sample surveys. Survey Monkey has a great tool to help you figure out how many survey responses you really need – just enter the total number of employees your communications were aimed at (population). If you'd like to learn more about how to do this – sign up for the IOIC's *Using Data to Demonstrate the Value of Internal Communications* training course.
3. **Technology** – Not everyone has access to technology that enables them to measure views, clicks and hits. Please use the information in this factsheet to help you design your own measurement approach that works for your organisation and the tools you have access to.

About the author

Creating a Campaign Measurement Strategy has been written by independent practitioner and trainer, Chris Crofts (Kinetic Internal Communications Ltd).

Chris has over two decades of experience in internal communication at large, multi-national organisations and has led the global IC functions at Aviva and Diageo. Chris started her working life as a statistician for the MOD and is passionate about helping IC pros to become more strategic through the use of data and insights. Chris runs the IoIC Data for Internal Communicators course.

Further reading

'How you can measure internal communications' – A community article on LinkedIn: https://www.linkedin.com/advice/3/how-can-you-measure-internal-communication a quick read that gives you an overview of the why, what and how of internal communications measurement. Internal Comms Pros are encouraged to add their own advice and experience to the article.

'Internal Comms Conversion: A Framework to Measure Communication Using Five Powerful Data Points' – This video, although linked to an analytics platform (Swoop) – talks through a measurement framework that helps you calculate an 'engagement score' for your communications content. https://www.youtube.com/watch?v=x_8lprjC18Y&t=1240s

The Government Communications Service has a wealth of resources freely available for all communicators working in the Government – and is open to the public. They have created a section on evaluating internal communications which talks through how to create an evaluation plan that covers inputs, out-puts, out-takes, intermediate outcomes and final outcomes: https://gcs.civilservice.gov.uk/guidance/internal-communication/evaluating-internal-communications/

They have also created a detailed document that sets out their recommended approach to measurement: **The GCS Evaluation Cycle** - https://gcs.civilservice.gov.uk/publications/gcs-evaluation-cycle/

'Auditing Organizational Communication' by Owen Hargie & Dennis Tourish provides a much more in-depth look at communication measurement and analysis methodologies, with practical examples, watch-outs and techniques.

'Successful Employee Communications – *A practitioner's guide to tools, models and best practice for internal communication*' by Sue Dewhurst and Liamm Fitzpatrick has a simple chapter on measurement and evaluation with a clear model to follow, case studies and ideas for data collection.

'**Exploring Internal Communication** – *Towards Informed Employee Voice*' edited by Kevin Ruck, provides a more academic overview of measurement, analysis and evaluation as well as explaining the ICQ10 employee survey questions for measuring the effectiveness of internal communications in general.