RETAIN Strategic Measurement Plan Template

The Retaining Employment and Talent After Injury/Illness Network (RETAIN) *Strategic Measurement Plan Template* (hereafter referred to as "the measurement template") is designed to be used in conjunction with the *RETAIN Strategic Communications Plan Guide* and *RETAIN Strategic Communications Plan Template*. The measurement template is a strategic document that outlines key performance indicators (KPIs) and metrics to use when evaluating the effectiveness of communications and public relations (PR) efforts. The template helps organizations develop a custom measurement plan to track and analyze the impact of their communications strategies, assess the success of their communications campaigns, and make data-driven decisions to improve future initiatives.

When used together, the communications plan guide and measurement template will guide you through the process of organizing and planning the evaluation of your RETAIN outreach efforts to employers, participants, and health-care providers. It is important to note that a successful communications and PR measurement plan focuses not only on quantitative metrics but also on qualitative factors, like brand reputation, stakeholder perception of your program, and the overall impacts of the communication and PR plan efforts on the program's objectives. Your measurement plan should be a dynamic and adaptable document that helps you continuously improve your communication efforts.

The measurement template provides one example of an effective organizational structure for a strategic measurement plan. However, this is not the only way to organize a strategic measurement plan. The template is an example that is intended to be customized to meet your state RETAIN program's communication needs and goals.

Table of Contents

Overview

Communications Tracking

Using relevant metrics to measure your program's communications goals is a top priority because it helps to determine progress made toward achieving RETAIN's SMART goals (see sidebar). The *RETAIN Strategic Communications Plan* delineates the intent of your communications and what you would like to achieve with health-care providers, employers, and RETAIN participants. The measurement template helps you identify metrics to measure the effectiveness of your communications plan and whether you are achieving your communication goals.

SMART Goals

SMART goals help you measure success and focus your efforts.

SMART stands for:

- **S**pecific
- **M**easurable
- **A**chievable
- **R**elevant
- **T**ime based

Developing SMART goals will help you cut through the wealth of available data. Ask specific questions for each data source, and make sure that the data are relevant to making strategic or tactical changes to your communications strategy.

Background

RETAIN implements and evaluates promising early intervention strategies to help newly injured or ill workers stay at work or return to work (SAW/RTW). The U.S. Department of Labor's Office of Disability Employment Policy, in partnership with its Employment and Training Administration and the Social Security Administration, is currently funding five state demonstration projects. RETAIN began in September 2018; the service period ends in November 2024.

Measurement Goals

Effective communication strategies are anchored in a comprehensive understanding of data and analytics. This section will provide a framework for identifying diverse data sources. These data sources range from internal metrics collected by the RETAIN program to insights garnered from various media outlets, social media platforms, and Google Analytics. The objective of this framework is to equip you with the tools needed to evaluate the impact of your outreach campaigns and refine your approaches to these campaigns for optimal outcomes.

Table 1 lists a variety of data sources and provides examples of questions that can be addressed using each type of data. Later sections of this measurement template provide details about how to use the data to answer these and other questions about the effectiveness of your communications strategy and how to set appropriate KPIs.

Find out which members of your team have access to each data source. If no one on your team has access to a data source (e.g., if access rights are restricted or if your account is not properly configured), outline the necessary steps to obtain access and designate a person to oversee this process.

Table 1. Data Sources

Data source	Question	Who has access to this data source?
Program data	How many providers per quarter receive training on RETAIN and SAW/RTW best practices?	
Program data	How many employers in opportunity zones did RETAIN engage with this quarter?	
Website metrics (most likely Google Analytics)	Are the communication efforts driving visitors to the website? Are website visitors from the target audience?	
	Which communications channel is driving the most website visitors? Specifically, which channel is driving the most people from your target audience to your website?	
	How can the channels used in your communications plan be optimized to better drive traffic to your website?	
Email analytics provided by your email marketing platform	Are efforts to grow the email subscriber list effective?	
	Do you have the right subscriber list to achieve your goals? For example, does your list include your target audience? Are subscriber email addresses current, or are you sending communications to unused emails?	
	Are subscribers clicking on the links in your emails?	
	How effective are the different subject lines?	
	How well is the call to action performing? Can it be optimized to perform better?	
	What is the best day and time to send emails (filtered by audience segment)?	
Social media in-platform analytics	How many owned posts have been shared? How many @mention posts have been shared? Which social media platform is getting the best engagement?	
	What is the total engagement with the posts?	
	How engaged are the account followers?	
	How many impressions have the owned posts received?	
	What are the top posts by engagement rate for each platform? • ***Tip:*** *Filter by target audience and content group.*	
Traditional advertising campaign reports (e.g., radio, TV, newspaper), typically provided by the organization with which you are advertising	How many people does each ad reach? What is the total number of people reached for the month or campaign period?	
	Did direct website traffic increase when a radio spot aired? • ***Best practice:*** *Compare your total number of website visitors after you began running radio ads to your total number of visitors during the previous months.*	

Data Sources and Data Collection Methods

The data sources and data collection methods for KPIs in the communications strategy involve leveraging various tools and platforms to measure the effectiveness of communications efforts. To identify which KPIs are needed, start with simple, straightforward questions tailored to each data source as outlined in the “Measurement Goals” section of this document. The questions you ask of each data set will determine the specific KPIs necessary to addressing them.

Specify the sources from which you will collect the data for each KPI. These could include tools like Google Analytics (Table 2), email platforms (Table 3), social media analytics platforms (Table 4), traditional advertising (Table 5), media monitoring services, and surveys. Then detail the methods you will use to collect the required data. For example, if you are tracking media mentions, you might use media monitoring software to capture and analyze relevant coverage. Each data source has a variety of available metrics to collect. Each metric can help measure the effectiveness of communication efforts in different ways.

Google Analytics

Table 2. Sample List of Website Metrics Available in Google Analytics 4

Type of metric	Metric	Definition	Filter
Are the communication efforts driving visitors, specifically the target audience, to the website?			
Audience	Total users	The total number of users accessing the website during the specified period.	Language City Audience segment (e.g., employers, providers, or individuals)
	Average sessions per user	The average number of sessions initiated by each user who enters the domain.	
	New visitors	A user who interacts with the domain for the first time.	
Which channel is driving the most visitors, specifically the target audience? How are the channels in the communications plan performing? How can they be optimized to perform better?			
Acquisition	Sessions started (session_start)	The number of sessions started by users. A session starts when a user enters the domain (or page) when no other session is currently active.	Default channel group Event name: session_start Campaign tracking (Urchin Tracking Module (UTM) parameters)
	Session	The period a user is active on the website or app. If a user is inactive for thirty minutes or more, any future activity is attributed to a new session.	
Do visitors find what they are looking for? How can the content be optimized to be more accessible? Is the website/web page offering a good user experience? What are the top events (engagements) that a visitor takes? Are visitors completing the action(s) that the communications strategy has specified for the website? How can the visitor journey through the website be optimized?			
Behavior	Engagement count (event_count)	The number of times the engagement or event was triggered for a specific period. Within this dashboard, the engagement count measures clicks to outbound links or file downloads.	“Get in touch” clicks Login clicks/register

Type of metric	Metric	Definition	Filter
	Engagement rate *Calculation: engaged sessions / total sessions*	The percentage of engaged sessions on your website. In other words, the engagement rate helps you measure the percentage of visits to your website or app that engaged with the page in a meaningful way.	
	Event name	Number of interactions with your content.	Click Scroll file_download Video engagement (if set up)
	Views (page_view)	Number of times a user loads a page of your website or accesses your website from their browser history.	Page path or page title Audience segment (if set up)
	Scroll	The number of times a user has scrolled through approximately 90% of the page.	

Email Metrics (General)

Table 3. Sample List of Email Metrics Available in Most Email Platforms

Email in-platform analytics			
Type of metric	**Metric**	**Definition**	**Filter**
Have efforts to grow the email subscriber list been effective? What is the quality of the subscriber list? How engaged are subscribers? How effective are different subject lines?			
Audience or Acquisition	Total subscribers	The total number of subscribers minus the total number of unsubscribes and hard bounces.	Audience segment (if set up)
	Open rate	The percentage of subscribers who open a specific email.	
	Bounce rate	The number of email addresses that did not receive your email.	
	List growth rate	The rate at which your subscriber list is growing.	
How well does each email perform? How is the call to action performing? Can it be optimized to perform better? What is the best day and time to send emails (filtered by audience segment)?			
Behavior	Number of unsubscribes	The number of subscribers who request to be unsubscribed after receiving an email from you.	
	Click-through rate	The number of subscribers who clicked on the links in your email.	
	Spam complaints	Reports made by email recipients about emails they do not want in their inbox.	

Email in-platform analytics			
Type of metric	**Metric**	**Definition**	**Filter**
	Forwarding rate/email sharing	The percentage of recipients who either shared your post via social media or forwarded it to someone else. *Calculation: (number of times an email is shared on social media or forwarded to someone else ⁄ total number of subscribers) × 100*	
	Amplification rate	The rate at which your followers/subscribers take your content and share it through their networks. *Calculation: (number of shares an email received ⁄ total number of subscribers) × 100*	
	Engagement over time	Measures when you get the highest click rates for emails that are not automated.	

Social Media (General)

Table 4. Sample List of Metrics Available in Most Social Media In-Platform Analytics

Social media in-platform analytics			
Type of metric	**Metric**	**Definition**	**Filter**
How many people are we reaching with social media? What platforms are performing best? Have efforts to grow our social media followers been effective?			
Audience	Total followers	The total number of users that are following your account on social media platforms.	
	Reach	The total number of people who see your content.	
	Impressions	The number of times your content is displayed, whether it was clicked or not.	
	Follower growth rate	The rate at which you are gaining followers. *Calculation: (number of followers you gained ⁄ the number of followers you started with) x 100 (over a specified time period)*	

Social media in-platform analytics			
Type of metric	**Metric**	**Definition**	**Filter**
Did people engage with our social media posts? **Is the call to action effective?** **Is social media driving traffic to our website?** • **Best practice:** Compare your total number of website visitors after you began running social media campaigns to your total number of website visitors during the previous months.			
Behavior	Total engagement	Tracks likes, comments, shares, and other interactions with your content.	
	Engagement rate per impression	The rate at which people engaged with your post. *Calculation: (total engagements a post received ⁄ the total number of impressions on that post) × 100*	
	Amplification rate	The ratio of shares per post to the number of overall followers. The higher your amplification rate, the more your followers are expanding your reach for you through shares. *Calculation: (number of shares a post received ⁄ total number of followers) × 100*	
	Click-through rate	The number of people who view a social media post or other piece of content and click through to read more or take some action. *Calculation: (total post link clicks a post received ⁄ the total number of impressions on that post) × 100*	

Traditional Paid Advertising (e.g., Radio, TV, Newspaper)

Table 5. Sample List of Email Metrics Available in Most Email Platforms

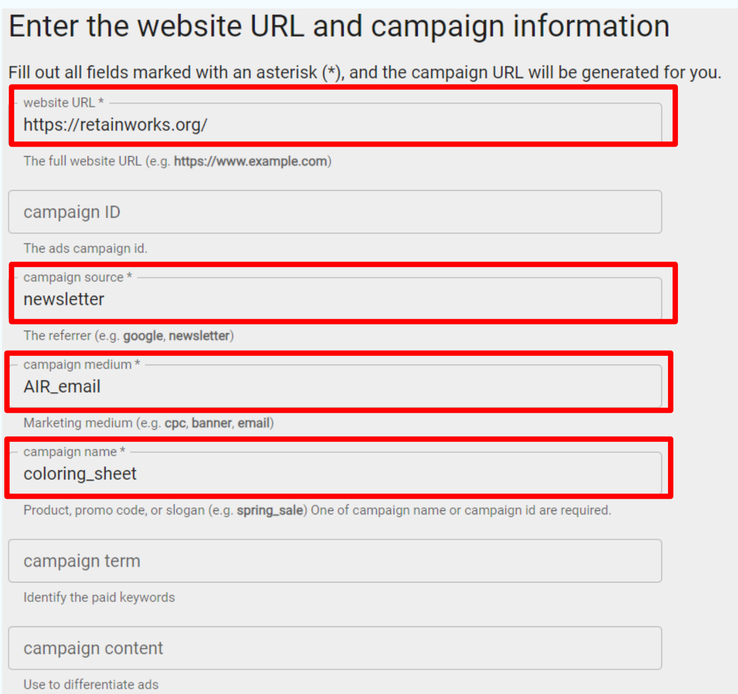
Social media in-platform analytics			
Type of metric	**Metric**	**Definition**	**Filter**
How many listeners/viewers are reached with each spot? What is the total for the month or campaign period? • **Best practice:** Compare your total number of website visitors after you began running advertisements to your total number of website visitors during the previous months.			
Audience	Reach	The number of people to whom the ad is served (e.g., listeners, viewers, readers)	
	Frequency	A measurement of how often the ad is served	

Analysis of a User's Journey (Example)

Urchin Tracking Module (UTM) parameters are invaluable tools for tracking and analyzing the effectiveness of communication or advertising efforts in driving website traffic. To use UTM parameters effectively, marketers can append unique tags to the URLs embedded in their campaigns, including their emails, QR codes, social media posts, and online ads. These tags include key information, like source, medium, campaign name, and content. By incorporating UTM parameters into website links, you can identify which channels and campaigns are driving the most traffic to your website.

Resource: [Campaign URL Builder]
Use this tool to easily add campaign, or UTM, parameters to URLs. This allows you to track whether specific outreach efforts are driving traffic to your website.

Figure 1. Screenshot of Campaign URL Builder Interface



The screenshot above shows how you would build a custom URL using the tool. The configuration shown in the screenshot would result in the following URL: https://retainworks.org/?utm_source=newsletter&utm_medium=AIR_email&utm_campaign=coloring_sheet

There are several key steps involved in analyzing the data collected through UTM parameters to measure users' journeys from seeing an advertisement or outreach effort to visiting the website and taking action. Here are some tips on how to conduct this analysis:

- **Data collection and organization:** Ensure that UTM parameters are consistently used across all communication and advertising channels and campaigns.
  Tip: *Maintain a standardized approach for naming conventions and for assigning values for source, medium, campaign, and other parameters. Organize the data in a centralized analytics platform, like Google Analytics.*
- **Goals and conversions:** Define specific goals and conversions within your analytics platform. Link these goals to your UTM-tagged campaigns to track their impact on user behavior.
- **Traffic source analysis:** Leverage the "Acquisition" section in the Google Analytics 4 platform to identify which sources and mediums are driving the most traffic.
- **Campaign performance:** Dive deeper into the Campaigns parameter in the "Acquisition" section to evaluate the performance of individual campaigns.
  Tip: *Look at metrics such as sessions, bounce rates, and conversion rates to assess the success of each advertising effort.*

Frequency of Measurement

The frequency of measurement for each data source or KPI will need to align with the goals and duration of your campaign. Determining measurement frequency is a crucial aspect of KPI management; the decision to use daily, monthly, or quarterly assessments will be based on the nature and timeline of your campaign. Adapting the measurement cadence to the unique characteristics of each metric ensures a strategic and efficient approach to monitoring performance and will allow you to make informed decisions throughout the campaign's life span.

Use Table 6 to capture the data source, the frequency of your data collection efforts, and the point person for capturing the KPIs for each data source. If data accessibility is currently restricted, outline the necessary steps to obtaining access, and designate the person who will be responsible for overseeing this process.

Table 6. Sample Frequency for Measuring Various Metrics

Data source	Frequency/Deadline	Who has access to this data source?
Google Analytics	Monthly	
Email in-platform analytics	Monthly	
Social media in-platform analytics	Monthly	
Traditional advertising	Monthly	

Benchmarks and Targets

Establish benchmarks and targets for each KPI. Benchmarks help you compare your performance against industry standards or past performance, while targets define the level of success you aim to achieve.

Setting benchmarks and targets involves a systematic approach to aligning your KPIs with specific standards and desired outcomes. To set a benchmark, follow these steps.

- **Collect historical data** if available. Research industry benchmarks to understand typical performance levels.
- **Set benchmarks** to act as reference points for comparison and help you gauge relative success. To do this, use industry standards, competitor performance, or your own past performance.
- **Define targets** that reflect your aspirations and what success looks like in quantifiable terms. Your targets should be based on the benchmarks you defined earlier.
- **Set realistic time frames** for achieving your targets. Some KPIs may have short-term goals, and others may align with longer-term strategic objectives.
- Continuously **iterate and improve** your benchmarks and targets based on ongoing insights and feedback. This adaptive approach ensures that your performance measurement strategy remains aligned with evolving business needs.

Responsibilities and Roles

The responsibilities and roles section is a critical aspect of a strategic measurement plan. By assigning specific people or teams to key tasks, you can ensure that data are collected, analyzed, and reported consistently. Table 7 provides an example of how to capture the distribution of responsibilities and ensure a coordinated effort among relevant, interested party members, including the PR team, communications department, data analysts, and external agencies.

Table 7. Sample Table for Assigning Responsibilities and Roles

Data source	Frequency/ Deadline	Team member	Description/Role
Google Analytics	Monthly		Collect data.
			Create/edit visualizations.
			Read, analyze, and recommend optimizations. Generate and/or draft a report.
			Review and edit written report.
Email	Monthly (or as often as needed for campaign optimization)		Collect data.
			Create/edit visualizations.
			Read, analyze, and recommend optimizations. Write report generation.
			Review and edit written report.
Social media	Monthly (or as often as needed for campaign optimization)		Collect data.
			Create/edit visualizations.
			Read, analyze, and recommend optimizations. Write report generation.
			Review and edit written report.
Traditional advertising	Monthly		Collect data.
			Create/edit visualizations.
			Read, analyze, and recommend optimizations. Write report generation.
			Review and edit written report.

Review and Iteration

The review and iteration process is fundamental to maintaining the relevance and effectiveness of the measurement plan for PR campaigns and communications strategies. Establish a regular cadence for reviewing the measurement plan to ensure it remains aligned with the evolving goals and priorities of the organization. This proactive approach allows for necessary adjustments to the measurement plan and ensures it remains adaptive and reflective of current objectives while continuing to provide meaningful insights.