

## Anne Gregory: some thoughts on the challenges of Measurement and Evaluation (M&E) in the field of public relations

Anne Gregory: algumas reflexões sobre os desafios de Mensuração e Avaliação (M&A) no campo das relações públicas

Anne Gregory: algunos pensamientos en torno a los desafíos de la Medición e Evaluación (M&E) en el campo de las relaciones públicas

Entrevistada  
Anne Gregory



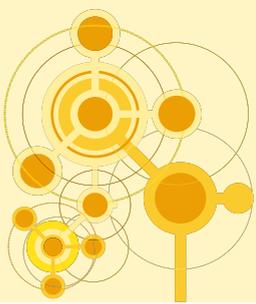
Gabriel Sadi

- PhD in Communication, Universidad Austral (Argentina)
- MSc in Institutional Communication and Image, UCAECE (Argentina)
- Senior Lecturer and Course Leader, MSc in Strategic Communication Leadership, University of Huddersfield (UK)
- E-mail: g.sadi@hud.ac.uk



Alejandro Álvarez-Nobell

- PhD in Strategic Management of Communication and MSc in Strategic Management and Innovation in Communication, Universidad de Málaga (Spain)
- Research Professor, Universidad de Málaga (Spain)
- E-mail: aan@uma.es



## Anne Gregory

- Professor Emeritus in Corporate Communication, Huddersfield Business School, University of Huddersfield (UK); Adjunct Professor at RMIT University in Melbourne; and London School of Public Relations – LSPR in Jakarta. She also holds Visiting Professor roles in Spain, South Africa, and Australia.

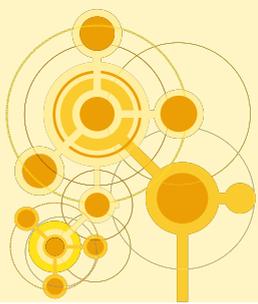
ORGANICOM – *Are changes in public relations (function, planning, strategies, and tactics) changing Measurement and Evaluation (M&E) or is it reciprocal?*

ANNE GREGORY – Yes, at two levels: first, it is clear that public relations is playing a more strategic role in organisational direction, strategy-formulation, and governance. The rise in importance of purpose and the ESG agendas in organisations, driven partly by the investment community, but also by societal demands, has opened up a significant opportunity and role for public relations. The overview and insight that public relations practitioners have of societal and stakeholder expectations and the guardianship that they have of the brand and reputation means that they are being invited to not only help deliver (communicate), but to shape purpose, strategy, and governance. Measurement and evaluation, therefore, needs to embrace whole organisation performance. This includes M&E of intangible assets (relationships, social capital, human capital – attraction, retention and performance of talent, reputation, etc) and, in the longer term, the contribution of this to tangible assets. It also will require organisations to ask not only “have my objectives been met?,” but also “have society/stakeholder expectations/objectives been met?” So, M&E will need to more fully address and find new ways of doing this – see the new methodology outlined in the paper also attached. The knowledge gained from M&E in this area will, in turn, shape ongoing adjustments to strategy overall – to answer your question: reciprocal and higher level.

Second, at the tactical level, there is much more use of digital channels and agile approaches to public relations. This means that the M&E cycle will have to be shorter, less linear, and smarter. The linear approach – to plan then implement – M&E, will need to change to instant and continuous M&E using techniques such as social and dynamic listening. My fear is because much M&E work is driven by agencies that mainly make money out of monitoring outputs and that have some outcomes across an ever proliferating number of metrics, measures, etc on individual channels; therefore, M&E will become very fragmented. What is needed is a much more holistic approach where there are a few key and common measures developed that apply across all channels and which are outcome focused.

ORGANICOM – *Can we refer to a second generation of objectives (global scale and very long term) and audiences such as “Nature” that require models with new levels of impact in M&E?*

ANNE GREGORY – These requirements have always been there. The issue is that public relations has not really addressed them because there has been too close a focus on the organisation meeting its objectives. With the advent of CSR there was an awakening that organisations had obligations beyond their own ends, although some ‘good’ organisations recognised this before CSR emerged onto the corporate agenda. The door opened up by CSR and an awareness of the threats faced by humanity, some of them existential (relationship with nature, climate change, population displacement, poverty, social injustice, etc),



combined with lack of action by some governments and a recognition that organisations do have societal obligations, has accelerated thinking and action here. Since the 1980/90's when stakeholder theory began to take hold, there has been a recognition that non-humans were also stakeholders (animals, water, climate, etc) and that they had a long-term stake. I agree that the **recognition** of global and long-term objectives is new, although the obligation has always been there. And yes, this recognition does mean that they have to be factored into M&E: more long-term measurement time scales, new types of measures such as for ESG accounts, and social good measures. The challenge will be aligning and/or reconciling them with the quarterly and annual financial accounting round. Ultimately, I believe there will have to be a re-calibration of the accounting system that runs at two levels, short-term and long-term, within time. The long-term being the more important because that is where true sustainability resides. I'm encouraged by initiatives such as the IFRS Sustainability Disclosure Standards which is being developed by the International Financial Reporting Standards Foundation – IFRS

*ORGANICOM – Approaching M&E from a tactical perspective (e.g. in internal communications, media relations, lobbying, events, etc.) facilitates its understanding and development at a professional level?*

ANNE GREGORY – This is the reality of where learning about and implementing M&E starts from a practitioner point of view. Competence is often built by moving along a spectrum from micro to the macro. A typical progression is starting at the micro, with M&E of individual activities (events, a social media intervention, etc.), then moving on to a part of a campaign or ongoing activity (for example with a specific stakeholder group or media relations), to M&E of a functional part of PR such as internal comms, public affairs, to M&E of Departmental performance and then to whole organisation performance as indicated in my answer above.

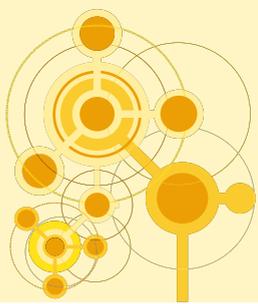
However, the micro to macro perspective is not enough because this can lead to un-coordinated and siloed approaches to M&E, to inefficiencies and can be non-strategic. A macro to micro perspective is also needed to ensure that all activities align with and contribute to the larger objectives that public relations have. This overview also helps the senior manager to be able to measure and compare the effectiveness and contribution of tactical activities and make judgements about necessary adjustments to the balance of public relations work, considering the effort that should be devoted to particular tactical activities and resources that should be given to them.

*ORGANICOM – To what extent is PR nowadays a “macro-information system for decision making” and M&E its main strategy?*

ANNE GREGORY – I would agree that is not only a macro-management information system, but also a micro-management information system. At the macro level, we know that, ultimately, organisations exist because they have the support of stakeholders. Public relations is ideally placed to be able to judge the health of stakeholder relationships and advise on how these can be secured, maintained, and enhanced.

The overview that PR seniors have of trends and issues that affect stakeholders and, therefore, their attitudes and behaviours. PR's knowledge of stakeholder communities and both their expectations of and reactions to organisational decisions is a crucial element of their work.

It is also vital that stakeholder points of view are part of the decision-data that is taken into account by organisational decision makers so that these decisions are enlightened and likely to obtain stakeholder support. The challenge for senior decision-makers is that stakeholder opinions often do not neatly coincide or are in conflict. Therefore, the importance they attach to the different stakeholder groups and the hierarchy of importance they have of them is a deeply moral issue. Traditionally, the most influential, powerful, and interested stakeholders take precedence but, sometimes, the most vulnerable, voiceless, and sceptical are the most important.



At the micro-level, constant M&E of individual activities, particularly regarding emerging issues and stakeholders, allows for agile, rapid, and nuanced responses. The analogy I would draw is that sailors set a course, having taken all factors into account, and check that they are on that course (strategy and direction), but also make small adjustments to the steering or sails depending on small shifts in wind and weather and to avoid obstacles.

*ORGANICOM – In terms of capabilities/competencies/skills that we have yet to develop in M&E, what would you say to those designing undergraduate/postgraduate or executive education/CPD curricula?*

ANNE GREGORY – The answer to this question is always the same when you ask Boards and senior managers. Public relations people lack business understanding and lack some of the basic skills like financial literacy, strategy-making, knowing how to put together business cases, understanding organisational structures, priorities and planning processes, risk assessment and mitigation, data and analytical skills, etc. In many ways we are to blame – if writing skills are most highly valued by agencies and by those recruiting junior practitioners (which they consistently are), it is hardly surprising. The industry also rewards 'creativity' per se (see winners of Award schemes) without recognising that problem-solving (which can be another name for creativity) is actually the underpinning skill.

Courses need to teach basic business skills – and that is a challenge for those located in Schools of Social Science or Journalism. This is important because if PR is to demonstrate its contribution and design M&E systems that have impact within organisations and demonstrate a whole organisation contribution, then they have to understand how organisations work. Other basic skills needed are data analysis, stakeholder identification, analysis and monitoring, business reporting (and the move to dash-board reporting), horizon scanning, and risk reporting. Soft skills are also needed so that they can have the conversations needed to be able to create M&E sentiment and influence strategy: influencing, negotiation, listening, empathy, judgement and, and this cannot be stressed enough, ethical decision-making skills.

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