HANDBOOK FOR MONITORING AND EVALUATING PROMOTION ACTIVITIES

CONTENTS

1. INTRODUCTION

Promoting a country's interests is a complex task. Changing the image of a country with one promotion activity is impossible. Nevertheless, each promotion activity can contribute towards greater understanding and knowledge in different specialist areas, helping us to constantly learn from the activities carried out and improve. This handbook uses previous experience to suggest ways in which a promotion activity can be organised, monitored and evaluated.

BACKGROUND

In 2014 the Council for the Promotion of Sweden (NSU) produced the report "Monitoring and evaluation in NSU". The report deals with theories and experiences on monitoring and evaluating promotion activities and results in a recommended framework for working on these issues.

This handbook is the next step in work to make it easier for contributing organisations to monitor and evaluate projects and activities effectively. The handbook has been produced as a supporting aid for planning, monitoring and evaluating promotion activities. The work is based on the Council for the Promotion of Sweden's (NSU) strategy for the promotion of Sweden abroad. This strategy identifies a number of success factors for working with promotion and is founded on the idea that successful promotion work starts out from Sweden's comparative advantages, the priorities and conditions of the different organisations and the local context and the needs of the target groups.

1.1 PURPOSE OF THE HANDBOOK

The purpose of the handbook is to provide support for planning, monitoring and evaluation that increases the likelihood of the different elements of promotion attaining the desired impacts.

The handbook does not replace ordinary planning instructions and monitoring and reporting systems in the respective organisation but is instead designed to operate as general guidance, with practical tools for working with these issues.

1.2 CHALLENGES AND OPPORTUNITIES OF MONITORING AND EVALUATION

Monitoring and evaluating promotion poses intrinsic challenges. The objectives that the activity seeks to attain are often "soft", such as changed attitudes and values or new opportunities for Swedish businesses. Such effects can be difficult to measure or assess – they are subjective, depending on factors other than those specifically linked to the activity and often not visible until a long time later.

Other examples of challenges in monitoring promotion are that it is difficult to follow the activities' participants over time, that political changes can make continuity difficult, that activities involving social media, for example, demand new methods for monitoring and evaluation and that it can be difficult to show which impact and how large a proportion of it is the result of a specific activity.

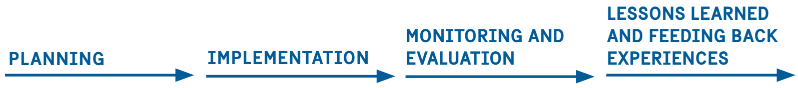
Although there are a number of challenges, there are also good reasons to monitor and evaluate activities. It is most important to determine whether the right things are being done in relation to the overall goals and whether they are being done correctly and founded on the strategy.

Monitoring and evaluation can have several purposes:

- Management – obtaining information for making well-founded decisions on how resources are spent, and also steering the activity towards the goals produced at the planning stage
- Learning and development – opportunity to develop effective methods and provide information to assess and develop strategies for better activities in the future
- Accountability – justify the use of resources by showing results, justifying budgets and paving the way for reasonable expectations
- Communication – open and clear communication on the impacts attained

1.3 THE PROCESS OF A PROMOTION ACTIVITY

A promotion activity generally follows the process described schematically in the diagram below, with planning, implementation, monitoring and evaluation as well as lessons learned and feedback on experiences. This handbook is divided into phases and deals with the areas Planning, Monitoring and evaluation and Lessons learned.



1.4 TERMS AND DEFINITIONS

Some terms that recur in the handbook are defined below:

- Promotion – work that seeks to promote Sweden's interests and those of Swedish companies. This may be more general promotion of Sweden or promotion of Swedish culture, trade, investments and tourism. The work can be direct or indirect. Promotion of cultural collaboration is an example of indirect work to promote Sweden.
- Activity – what is delivered or what we carry out, e.g. a seminar.

- Impact – the change that the activity seeks to achieve. For example, the number of new companies able to become established in a market increasing by X as a result of the activity.
- Goal – what is to be attained for the activity to be said to be successful. The goal is "a desired future situation".
- Monitoring – a term that usually means some form of accounting for what is carried out in an activity. This starts out by constantly collecting information that makes it possible to follow the development of the operation, decisions, etc. over time, and it is often carried out by someone involved in the operation themselves, e.g. the project manager.
- Evaluation – an examination and analysis of an activity or an operation. What characterises evaluations is that they build on systematically compiled material and must be carried out according to scientifically recognised methodology. A scientific approach is a key characteristic of evaluations, which means that they are often carried out by independent researchers or experts.
- Quantitative methods – used to investigate the parameters that can be counted in one way or another; number of visitors, listeners, mailings and percentages. This information, however, does not answer questions that address whether the target group (the direct or the wider target group) has been affected by the activity or the message conveyed and why.
- Qualitative methods – are used to investigate aspects that involve some form of valuation. This is often done via interviews, surveys or focus groups in which the participants' opinions and judgments can be ascertained.

1.5 PLANNING, MONITORING AND LEARNING CHECKLIST

Following the different steps of the handbook creates a good framework for managing and monitoring a promotion activity. The handbook can also be used as reference material for support in the different aspects of the process.

PLANNING, MONITORING AND LEARNING THE CHECKLIST

The following checklist can be used as a reminder of the different steps of the process described in the handbook.

PLANNING

- Context check – are the prerequisites in place for carrying out the activity and what are they?
- Who is the activity geared towards? Who is the target group made up of? Who should we work with?
- What do we want to achieve with the activity? What are the desired impacts?

- Set out the desired impacts using the SMART method (see page 9).

MONITORING AND EVALUATION

- What do different stakeholders want to know about the activity? What needs to be monitored and how should this be done? This may involve questions such as: Have we done what we wanted to do and have we attained what we wanted to attain?
- Gather information on what you want to know. Quantitatively or qualitatively?
- Search the information collected to find the answers to what you want to know.
- Analyse the results and write a report if required.

LESSONS LEARNED AND FEEDING BACK EXPERIENCE

- What have we learned and what should we have done differently?
- What will we take with us in our work in the future?

2. PLANNING

PLANNING → IMPLEMENTATION → MONITORING AND EVALUATION → LESSONS LEARNED AND FEEDING BACK EXPERIENCES →

In work on turning an idea into reality, planning is the be all and end all. The planning phase is when the groundwork is laid for what an activity will involve, who it is to be geared towards and what it is to lead to.

To design promotion activities with high potential to attain successful results, the planning phase should include a context analysis, target group analysis and creating good goals.

Different elements in the planning phase:

CONTEXT ANALYSIS	How can we work with Sweden's comparative advantages in the local context?
TARGET GROUP ANALYSIS	Who are the target groups and what are their needs and interests?
SETTING GOALS	• What changes should be attained? • Show what causal links (direct links) are assumed to exist between activities and the desired impacts. • Set out what the initiative should lead to in the form of specific goals (SMART).

2.1 CONTEXT ANALYSIS

All change processes interventions or activities involved in promotion are part of a wider context. If the planning of an activity is to be relevant, it must be preceded by an attempt to clearly see the bigger picture. Context analysis is about identifying what the prerequisites, opportunities and needs are in the local context and how Sweden and Swedish companies can be relevant in meeting these.

CONTEXT ANALYSIS

For support in putting the activity in its context and clarifying its purpose or focus, answer the questions below. When themes are mentioned, this refers to themes set out in the Strategy for the promotion of Sweden abroad. Other areas of interest may naturally also be relevant in the analysis.

1. **Local context**
   - What are the current challenges and opportunities in the local context?
   - What themes are relevant in relation to these?
2. **Sweden and the relevance of Swedish companies**
   - What are the comparative advantages of Sweden or Swedish

companies in relation to local opportunities, challenges and Identified themes?

3. **The complementarity of the activity in relation to other activities**
   • What existing activities are we or others carrying out to meet local challenges and take advantage of opportunities? Can we work together?
   • Which format is the most appropriate and why?
4. **Priorities and prerequisites of the organisation**
   • What opportunities do we have to carry out relevant activities to meet local needs?
   • How does the activity relate to the overall goals of the promotion?
   • Who can we work with on this activity?

2.2 TARGET GROUP ANALYSIS

One key to creating relevant projects is to identify who you want to reach. In planning you need to think about what the broader target group is and accordingly which groups or individuals should be included in this work.

Different target groups are relevant to different types of activity. In work on the image of Sweden abroad, it can be particularly relevant to place the emphasis on which individuals (known as Connectors) can help us to communicate to a broader end target group. In trade and investment promotion, on the other hand, more emphasis may perhaps be placed on how, together with our partners, we can directly reach the decision-makers who affect purchasing and contracts that the Swedish companies want to win, or who decide on where new investments in other countries are to be made.

METHOD FOR SYSTEMATIC WORK WITH TARGET GROUPS

The following questions offer support in working with target groups. Start from the context analysis carried out (see page 7).

1. **Define** the end target group
   • Who is the activity to influence?
2. **Identify** and meet people in your local network who have knowledge and or contacts in the relevant field and can help to make the target group more specific
   • What existing activities and networks are there?
   • Wwhat are their interests?
   • Who are they listening to?
   • How do these networks communicate?
3. **INVOLVE** Involve the target group in creating the activity
   • What is the target group interested in doing with us? (Co-creation)

• Which individuals from the target group have the potential to reach many others in the target group?
(Connectors)

4. **MANAGE** trust capital and nurture cooperation
• Continue dialogue with the target group, think about risks, evaluate cooperation together, constantly use your contacts as references, invite and link together new people/organisations that are of interest.

2.3 SETTING GOALS

A goal describes a desired future situation. Setting goals involves making reality concrete and giving it a direction. The goals must drive, motivate and inspire – and as far as possible be measurable.

Goals can be set for all the different parts of an activity. They may be for the amount of resources to be earmarked (budget or resource goals), what is to be carried out (number of activities, number of participants, etc.), the quality an activity should have and the result you want to create, i.e. the effects to be attained in the short, medium and long term.

IMPACTS

In working to formulate the desired impacts of an activity, two questions can be used as a guide:

- Which change/changes should have been attained in the target group once the activity is complete?
- What should the activity contribute if we are to attain the overall oals of our operation?

THE IMPACT CHAIN

One good tool for this is to draw up an impact chain. The impact chain illustrates the causal links between activities and their impacts in the short, medium and long term. The further away from the activity you get, the harder it is to clarify causal links between activity and impact.

ACTIVITY	SHORT-TERM IMPACTS	MEDIUM-TERM IMPACTS	LONG-TERM IMPACTS
Activities carried out and services produced	Changes in participants as a direct consequence of the activity	Impacts of active measures by participants	Change at the level of society that has been generated as a result of the activity
e.g. courses, advice, workshops, seminars	e.g. learning, change in attitude, improved capabilities, greater involvement, motivation, contact between Swedish companies and potential business partners	e.g. decision-making, policy change, social action, behavioural change, purchasing or investment decisions	e.g. change in social, economic or environmental conditions, change in conditions for citizens, increase in Swedish exports, new investments in Sweden, more tourism to Sweden.

THE IMPACT CHAIN – SUPPORT IN SETTING GOALS AT DIFFERENT LEVELS

Start by using the diagram above. Impact chains are designed backwards and then broken down step by step. The questions that can be useful in formulating each step are set out below. The steps presented are introduced with a rule of thought to clarify what should be borne in mind in designing the chain.

1. **Long-term impacts: "Our dream is to..."**
   • What change should the activity attain in society, in organisa tions?
   • In what way has the target group acted to benefit our interests? Examples: Our dream is for increased cooperation between foreign and Swedish companies benefitting trade and relation ships in the long term.
2. **Medium-term impacts: "To attain long-term impacts we need to ensure..."**
   • What should the target group/recipients do after the activity? Examples: To attain impacts in the long term we need to ensure that: contacts first made in connection with an activity have produced actual impacts in the form of cooperation, new companies, increased trade, policies, etc.
3. **Short-term impacts: "To attain medium-term impacts we need to offer…"**
   • What should the target group/recipients take with them immediately after the completion of the activity?
   Examples: To attain medium-term impacts we need to offer: more awareness of Sweden or Swedish companies, greater interest in travelling to Sweden or doing business, etc.
4. **Activities: "To contribute towards short-term impacts, we need to..."**
   • What activities are required to attain this?

Examples: “To contribute towards short-term impacts,
we need to:
create opportunities for meetings between...
offer seminars on...
market towards...
etc.”
• It can also be useful to think through the outcomes that you want these activities to have, e.g. can effective information about an event produce the outcome that many or the right people attend, creating better prerequisites for attaining the right impacts. Examples of things to follow up: Number of followers in social media, number of visitors to a seminar, number of people participating in a business meeting.

OTHER TYPES OF GOALS

It can be interesting to set goals for aspects other than the impacts of the activity, such as effectiveness goals linked to time, budget or resources, or goals concerning how participants experience the quality of the activity.

QUALITY AND SATISFACTION – ASSESSMENT OF HOW THE TARGET GROUP EXPERIENCE THE ACTIVITY

Satisfaction can be seen as a short-term impact but can also be linked to goals about the brand and other quality aspects. The following questions can provide guidance in drawing up quality and satisfaction goals:

- What expectations do participants have of the specific activity? (Level of service, treatment, time, place, premises, networking opportunity, moments of realisation, etc.)
- Which of these can be considered to be the most important factors? (What underlies this assessment can be brand awareness, target group analysis, etc.)
- Which of these factors do we want to follow up?
  – Which do we want to set goals for to ensure greater focus and steerability?
  – Which do we want to follow up so that we can monitor them over time or highlight their results? (There is no need to set goals for this but it should be included in designing monitoring; see more on page 13),
  Examples: Participants feel that the event is communicating the Sweden brand (open, innovative, thoughtful and genuine). The content on the website is relevant and correct.

FORMULATING SPECIFIC GOALS

Once the impacts have been described and other areas for follow-up or setting goals have been discussed, they must be turned into goals that can be assessed and, if possible, made measurable. The SMART method can be used to formulate the results/goals.

THE SMART METHOD – FORMULATING EFFECTIVE GOALS

This goal formulation method comprises five criteria that can be used to support work on developing and subsequently evaluating goals. The SMART method can be used on all types of activities and different goal levels.

- **S**pecific – Are the results clear and well defined?
- **M**easurable – How much? How many? How will we know that the goal has been attained?
- **A**ccepted – Is there a shared view that the goal is relevant and important? Are all important elements involved?
- **R**ealistic – Can the results be attained using existing resources and are they reasonable?
- **T**ime-dependent – Without a schedule the drive to attain the goal is weak and the goal is meaningless. Having a date in place sets the machinery in motion.

2.4 PREPARE MONITORING AND EVALUATION

In the same way as a project manager was appointed to carry out the activity, it is appropriate to appoint one person responsible for the impact, monitoring and evaluation of the activity. These two roles can be held by the same person in small activities or by two people in large activities (see also the report “Monitoring and evaluation in the NSU”).

Some monitoring is carried out in direct connection with the implementation of the activity and must be prepared simultaneously with activity planning – for example, if you want to count the number of participants or interview participants on the spot about the quality and impact of the activity. For this reason planning monitoring and evaluation must form part of the planning of the whole activity.

3. MONITORING AND EVALUATION

PLANNING → IMPLEMENTATION → MONITORING AND EVALUATION → LESSONS LEARNED AND FEEDING BACK EXPERIENCES →

This chapter focusses on monitoring the results, i.e. how implementation and the impacts the activity has led to can be followed up. Extra focus will be placed on what can be directly linked to the activity, i.e. short-term impacts.

Promotion projects and activities can vary in scope and the monitoring for a small activity does not need to answer as many questions as for a large one. On the other hand, it is a good idea if monitoring, whatever its scope, to some extent incorporates the different parts of the monitoring phase presented in the box below.

Different elements in the monitoring phase:

DESIGNING MONITORING	– SET OUT WHAT IS TO BE FOLLOWED UP. – SET OUT PARAMETERS AND/OR BROKEN-DOWN GOALS (INDICATORS)
DATA COLLECTION	– IDENTIFY WHICH METHOND IS TO BE USED, HOW DATA IS TO BE COLLECTED – COLLECT DATA
ANLYSIS AND REPORTING	– ANALYSE – REPORT

3.1 DESIGNING MONITORING

When designing monitoring, you define how the goals of the activity are to be measured or assessed.

In this phase you should also think through what is to be monitored for which goals may not have been set. Firstly, in the planning phase, aspects of the activity may have been discussed that you have wanted to monitor or highlight but for which goals have not been set (such as new followers on social media) and secondly, things may have arisen while work was in progress that there is an interest in following up.
On the basis of the goals and guided by the questions in the figure below, monitoring can now be designed.

QUALITY, SATISFACTION, OUTCOME	IMPACTS, SHORT-TERM	IMPACTS, MEDIUM AND LONG TERM
• Did participants enjoy the activity? • Did they perceive the message as intended? • Did the activity live up to participants' expectations? • Would they be prepared to recommend the activity? • Did they understand who the sender was? (Sender ID) • Did the "right" people/organisations attend? • How many people attended?	• Did their interest in the topic increase? • Did they learn anything? • Did they gain new contacts/relationships?	• Did they use their knowledge/insights? • Did they pass on their knowledge/insights? • Did they actively work towards the goals of the activity? • Did this contribute towards any change?

In work to try to assess whether a desired change took place, there are two main working methods that can be used – the first is to measure before and after (baseline) and so be able to assess the change, and the second is to look for signs that change has taken place (indicators).

BASELINE

To investigate a change in participants it may be necessary to ask them questions before they participate in the activity. Here it may be appropriate to ask the participants the same questions before and after the activity to be able to say something about the change. In cases where a baseline measurement is not taken, participants can be asked to estimate the change attained as a result of the activity.

MEASUREMENTS AND INDICATORS

The word "indicator" means a sign (of something). Indicators can be used as measurements in many different contexts.

A quantitative indicator is a fact linked to goals and reported as a number (number, mean or median) or a percentage. Qualitative indicators are often about what can be termed "soft" data, such as attitudes, convictions, motivations and individual behaviours. To easily be able to compare and monitor activities over time, it is a good idea to attempt to quantify these data. For example, participants can be asked to estimate their satisfaction on a quantitative scale.

INDICATORS – STEP BY STEP

If SMART goals have been set, the indicators are basically already in place. Otherwise, the following checklist can provide guidance in producing indicators:

1. **Which of the goals should be monitored (now)?**
   • Longer term impacts are possibly not monitored at all, or are addressed later.
2. **Which goals are to be monitored with the help of indicators?**
3. **What should the indicators focus on in relation to the goals?**
   • An indicator can show whether a goal has been met, completely or in part.
   Example:
   Impact goal, medium term: More tourists visiting Sweden from country xx
   Indicator: No. of tourists from country xx in July 2015–2017
   Impact goal, short term: increase interest in tourism to Sweden
   Indicator: proportion of recipients whose interest has increased /A specific goal could be: Proportion answering 4–5 on a 5-point scale (when asked about increased interest) is 85 %)
   Example:

Goal: we have reached the right people
Indicators: number of people who attend, proportion of participants who think the activity was relevant

4. **Revise the overall collection of indicators.**
   • Do they correspond to the goals and do they provide sufficient – but not excessive – data for analysis?
   • Think about aspects such as the following: are stakeholders/recipients getting the information they need? Can we see a causal link in the impact chain if we want one? Do we have indicators for aspects of the working process if we want them? (see more about this in the section on Data collection, page 15)
   • If possible, find out the current values (see also baseline, page 14).

3.2 DATA COLLECTION

The next step in monitoring is to decide where and how the information is to be obtained. A distinction is often made between quantitative and qualitative methods (such as statistics versus subjective assessments).

DATA COLLECTION STEP BY STEP

All data collection must be based on previously formulated questions and indicators. It should also be based on the target group for monitoring – this may be clients, a selection of the end target group, partners and/or project members.

1. **What are the existing sources of data?**
- How often should data be collected?
2. **What information must be produced and how?**
   (data collection methods)
- Limit data collection to what is really relevant to be able to say anything about whether goals have been met. This is to avoid the risk of having to manage excessively large amounts of data.
- Make sure that the data collection method selected is carried out correctly. For example: test large surveys before sending out the final version and make sure they are anonymous.
- Carry out the selection process correctly. Either all participants should be asked or you will need to select a sample. Either select a random sample or choose those who you are going to ask. The more people you can ask, the more reliable your analysis of the answers will be. A good rule of thumb can be that the response rate must be more than 70 % of the sample in order to draw general conclusions.

MOST COMMON DATA COLLECTION METHODS

Brief descriptions of the most common data collection methods are provided below. The methods can be used for monitoring the work process, quality and satisfaction as well as impacts in the short, medium and long term.

COUNT OR ESTIMATE

Assessing how many participants visit/take part in an activity is an important monitoring parameter. It is an advantage if, during the activity itself, you are able to find out how many people are there, e.g. through participant lists or by someone in the team counting everyone in attendance. It may also be worthwhile to try to assess the proportion of women and men, the age distribution and the target group they belong to, if any.

Some promotion activity has the goal of generating media attention. To measure the spread and visibility of an activity and the reach of the message, different types of media analysis can be carried out. PR agencies or media companies often offer these services but it is also possible to carry out simple media analysis yourself.

SIMPLE MEDIA MONITORING

Start with the activity and its goal.

1. **Identify what must be measured or analysed**
   • Which indicators are signs that the goal has been met.
   Examples: Number of articles, advertising value, number of readers (range), positive/negative content
2. **Think about whether we want to influence the response**
   • Incorporate this in the way the activity is carried out. This can be achieved by inviting journalists, writing press releases and/or providing journalists with material about the activity.
3. **How should the analysis be carried out?**
   • Identify the channels/media that are to be monitored
   • Determine how long the monitoring is to continue
4. **Construct an analysis model**
   Examples:
   • number of articles in large (> 1 million readers/circulation), medium (50 000 – 1 million readers/circulation) or small-scale media (< 50 000 readers/circulation)
   • advertising value – estimate of advertising rate based on local advertising costs for the medium in question
   • range – how many people have potentially been reached by the information – based on the circulation of the medium in question
   • positive or negative content – based on an analysis of individual words that can be perceived positively or negatively depending on how the article as a whole is perceived.

MANAGE EXISTING STATISTICS

Existing statistics are sometimes available; these may be visitor figures from partners, information on websites in Google Analytics or information on involvement in social media.

MEASURING INVOLVEMENT IN SOCIAL MEDIA

For many social media, statistics are available for the different channels. What needs to be decided is how to assess the statistics.

In social media there are various forms of basic data for interaction, the most common types being:
Comments (C) – number of comments per post or tweet
Reach (R) – How many people have seen a post
Shares (S) – How many times a post is shared
Likes (L) – How many likes or favourites a post has received

To easily evaluate a post/update or tweet, it can be a good idea to calculate the average value of the account, e.g. using 10 tweets:
Spread – the account's average number of shares per post/update or tweet.
Applause – the account's average number of likes per post/update or tweet.

For Sweden's official Facebook account the different interactions have been combined into a single "involvement" measurement. The formula is based on a weighting of the different interactions. The assessment carried out for this particular account is that everything that receives an involvement level between 1 and 2 is good; more than 2 is rated as viral. The following formula is used:

$$ENG = 100/R * (L*0.10 + S + C*0.66)$$

SURVEYS

Surveys are often used as an investigative method because they are an easy way to receive a large number of responses and make reliable analyses. Surveys "measure" subjective experiences by individuals rating e.g. satisfaction, quality or whether people have received or been able to use new knowledge or new relationships. Surveys can be more qualitative or more quantitative.

CREATING A SURVEY

Here is a detailed description of the procedure for producing surveys.

1. **Select respondents**
   - Ask everyone or select a sample (see pages 26–34)

2. **Design questions**
   • Limit the number of questions. 10 questions is a good rule of thumb.
   • Think about what the answers will be used for. Is the aim to obtain quantitative material or are multiple choice options preferable? If the aim is to obtain qualitative responses, for communication, for example, open text fields are preferable. Remember that using multiple choice options makes data collection easier and makes it easier to analyse the survey.
   • Don't ask leading questions. An example of a leading question is: "Why did you think the exhibition was good?" Ask instead: "How satisfied or dissatisfied were you with the exhibition?"
   • Ask one question at a time so that the respondent knows what he or she is answering. For example: "How much has your interest in fashion and sustainability increased?" Instead, divide the question into two different questions or make it more specific by asking about "sustainable fashion".
3. **Send out the survey**
   • Preferably use a survey tool. There are various tools on the market that offer the opportunity to create simple surveys free of charge.

INTERVIEWS AND FOCUS GROUPS

Interviews and group interviews (also called focus groups) are one way of obtaining information from the participants or the target group. Interviews and focus groups can be carried out in different ways:

- In-depth interviews – open questions that encourage the interviewee to bring up what they want to say themselves – the interviewer does not use their questions to guide the interview
- Semi-structured interviews, including pre-defined topics – the interviewer uses their questions to guide the subject matter but not opinions.
- Structured interviews – fixed questions with stated or open response categories. No follow-up questions or deeper exploration. Not recommended for focus groups.

CARRYING OUT AN INTERVIEW

Here is a detailed description of the procedure for carrying out interviews.

1. **Select interviewees**
   • Ask everyone or select a sample.
2. **Develop an interview guide**
   • Questions should be asked in a way and in an order that is logical for the interviewee – not alphabetically!

- When producing an interview guide, think about who will be interviewed and the language that is appropriate.
- Think through the type of analysis work that will be required.
- It is often appropriate to carry out pilot interviews to test the interview guide and adapt it accordingly.

3. **Carry out interviews**
   - Describe the purpose of the interview
   - Give the interviewee an idea of the bigger picture as far as possible – it helps to focus their answers and also gives them a sense of being important, not just a cog in the wheel
   - Tell them why they were selected and who by and how their answers will be used/fed back
   - Be clear in your wording and guide the conversation
   - Listen actively and have clear body language
4. **Feedback**
   - Provide feedback on the results of the interview and the analysis to your interviewees.

MONITORING THE WORKING PROCESS OF A PROJECT BY MEASON OF A FOCUS GROUP

Data for monitoring the process can be collected in a number of different ways depending on what you want to follow up on. The following questions can be used as a basis for dialogue during a follow-up meeting:

1. **Credibility**
   - How well were we able to achieve trustworthy communica tion? (on the basis of core values)
2. **Consistency**
   - How well were we able to communicate a consistent message (theme, visual identity)
3. **Relevance**
   - How successful was our context analysis? In other words, adapting the activity to the local context and conditions.
4. **Customisation to target group**
   - How well were we able to carry out a relevant analysis of the target group?
   - How well were we able to reach the identified target group?
   - How well were we able to involve the target group in carrying out the activity?
5. **Cooperation**
   - How well were we able to integrate different activities to enable synergies?
   - How well did we succeed in involving the right partners?
   - How well were we able to start out from common benefits and formulate common goals?
   - How well did dialogue and task allocation work?

3.3 ANALYSIS AND REPORTING

Once the information has been collected, it is time to analyse it. This involves interpreting the information and drawing conclusions.

Part of the analysis may involve finding answers to whether the activity has achieved the goals set or to what the activity may have contributed to. The overall questions for which answers are sought are:

- What does the information collected say? Did we achieve our goal?
- On the basis of the information collected, can it be said that observed impacts are due to the activity?

It is important to think about the reliability of the analysis. Does the sample for data collection represent the target group, are the conclusions supported by facts and are the assessments objective? It is fine to draw conclusions and make assessments on the basis of experience and professionalism but it is important to be clear about what the conclusions are based on.

The reporting should set out the monitoring and analysis carried out. How the results are reported will vary depending on the operation within which the activity has been run. One basic rule is that a report must be made to everyone involved. Attempt to tailor the information to the recipient.

ANALYSIS AND REPORTING METHOD

A structure for analysis and reporting is provided below:

1. **Systematise and categorise**
   • Systematise and categorise the collected data according to the indicators/sub-goals previously formulated.
2. **Reflect and analyse**
   • Analysis is carried out on the basis of the goals set and the impact chain. Do not be in too much of a hurry to study the details. Start by gaining an overview and describe patterns and trends.
   • When something stands out, is unexpected or is particularly interesting, it is a good idea to study the information in more detail.
3. **Sum up**
   • Describe the purpose of the activity and its goals.
   • Describe the implementation of the activity. Who was the target group, what was done and who were the partners, if any?
   • State the results of the data collection (e.g. how many visitors attended, whether the activity was appreciated, media impact, resources invested in terms of time and money, etc.)

• Present analysis and conclusions. Be clear and specific about what are judgments/viewpoints and what is supported by facts.

3.4 EVALUATION

Promotion projects and activities can vary in scope, have different goals and serve different target groups. An evaluation of activities seeks partly to find answers to why and what can explain the impacts of an activity.

Work on monitoring and evaluation is central to being able to answer the question of what activities have positive impacts but also to making it clear what it is that has led to the impacts. Monitoring often answers the question of how things are going while evaluation answers the question of why it is going the way it is. This involves critically examining and evaluating what has happened in work on an activity. Evaluation seeks to explain why something has happened. In promotion work an evaluation can provide good knowledge that can contribute towards lessons learned. An evaluation can, for example, provide information on how effectively goals and effects have been attained and/or the nature of the impact of the activity in the target group. Evaluation often demands a broader overview than the activity itself, e.g. events in the surrounding world and in a broader context outside the activity that may have affected the result. An evaluation answers questions such as:

- Was the activity successful?
- What went well and why?
- What went less well and why?
- What went badly and why?

External assessors are often hired as this is work that demands an independent evaluation as well as time and a systematic approach. If an external evaluation of an activity is needed, it is a good idea to discuss it right at the start of the activity.

PREPARING THE EVALUATION

The following checklist can be used to prepare an evaluation yourself or together with evaluation consultants:

1. **Clearly establish the focus**
   • What questions need to be answered?
   • What aspects should the evaluation shed light on?
   For example, the project’s implementation, relevance, degree to which it has met its goals, cost-effectiveness, sustainability of results over time and long-term impacts
2. **Determine design**
   • Start out from the goals or the impact chain.

- Find out what data is available. Is there follow-up data from the activity? Previous evaluations? Research? Other studies? Contact information for participants?
- Think about how data should be collected.

4. LESSONS LEARNED AND FEEDING BACK EXPERIENCE

PLANNING → IMPLEMENTATION → MONITORING AND EVALUATION → LESSONS LEARNED AND FEEDING BACK EXPERIENCES →

As well as highlighting the impacts that an activity has had, monitoring and evaluations can contribute towards learning lessons and feeding back experience. Lessons are learned by feeding back on what has been highlighted during the monitoring or evaluation to those who worked on the activity and carrying out a dialogue with those responsible and affected. For lessons to be learned, it is therefore important to ensure the involvement of employees and those responsible for the activity.

Two main questions to ask to encourage learning on the basis of monitoring or evaluation are:

- What have we learned and what should we have done differently?
- What will we take with us in our work in the future?

Learning from an activity, whether it was successful or not, involves great opportunities to make use of lessons learned in future activities and so achieve even greater success.

LEARNING THROUGH DIALOGUE

By bringing the work team and/or partners together and carrying out a discussion using the steps in the model below, it is possible to identify different experiences and thoughts to foster shared learning.

1. **Identify who needs to participate in the meeting**
   • Internal project participants, partners and if the activity was carried out jointly with the target group, they should also be involved
2. **Facilitate dialogue from the outside**
   • Planning and goals
   – Were the planned activities carried out?
   – Can we follow the steps in the impact chain?
   • Following up the work process
   – Have we attained any goals we set on the process and quality?
   – How did cooperation work, etc.
   • Following up the impacts
   – Have we attained the goals we set regarding impacts?
   Did we set the right goals? Can we see other impacts of the activity?

3. **Compile and communicate the results to everyone involved**
   • Also think about other ways of passing on lessons learned and who would be interested in and benefit from sharing in these experiences. This can, for example, be reports, seminars or presentations.

We hope that this handbook has provided support and guidance in your work on monitoring and evaluating promotion activities. For more in-depth information on the subject, please refer to the report “Monitoring and evaluation in the NSU” (2014).

APPENDIX – TABLE OF PARAMETERS AND WORDING FOR QUESTIONS

TYPE OF PARAMETER	PARAMETER	QUESTIONS IN SWEDISH	QUESTIONS IN ENLIGSH
INTEREST	Proportion of participants who think that their interest in (topic of the activity) has increased as a result of the activity.	Mitt intresse för (inriktning på projektet/aktiviteten) har till följd av mitt (deltagande/besök) • Ökat mycket • Ökat något • Varken ökat eller minskat • Minskat • Minskat mycket • Vet ej	My interest in (the subject matter of the activity/project) has, as a result of (participating, visiting) the (activity) • Significantly increased • Slightly increased • Neither increased nor decreased • Decreased • Significantly decreased • Do not know
KNOWLEDGE SKILLS / TOOLS	Proportion of participants who think that their knowledge of (topic of the activity) has increased as a result of the activity.	Mitt deltagande i (aktiviteten) har gett mig ny kunskap som rör (inriktning på aktiviteten) • Instämmer helt • Instämmer delvis • Varken eller • Instämmer inte • Instämmer inte alls • Vet ej	My participation in (the activity/project) has provided me with new knowledge about/ which relates to (the subject related to activity) • Strongly agree • Partly agree • Neither agree nor disagree • Disagree • Strongly disagree • Do not know
	Proportion of participants who think that as a result of the activity they have gained new skills or tools that they can use in their work on (the subject related to the activity)	Mitt deltagande i (aktiviteten) har gett mig nya kompetenser (eller verktyg) som jag kan använda i mitt arbete med/för (inriktning på aktiviteten) • Instämmer helt • Instämmer delvis • Varken eller • Instämmer inte • Instämmer inte alls • Vet ej	My participation in (the activity/project) has provided me with new skills or tools that I can use in my work with/for (the subject related to activity) • Strongly agree • Partly agree • Neither agree nor disagree • Disagree • Strongly disagree • Do not know
SATIFACTION/ RECOMMENDATION	Proportion of participants who think it likely that they will recommend the activity to others.	Är det troligt att du kommer rekommendera (aktiviteten) till någon annan? • Mycket troligt • Troligt • Varken troligt eller otroligt • Otroligt • Väldigt otroligt • Vet ej	Is it likely that you will recommend the activity to someone else? • Very likely • Likely • Neither likely nor unlikely • Unlikely • Very unlikely • Do not know
	Proportion of participants who are satisfied with the activity.	I vilken utsträckning är du nöjd med (aktiviteten/innehållet i programmet)? • Mycket nöjd • Nöjd • Varken nöjd eller missnöjd • Ganska missnöjd • Missnöjd • Vet ej	To what extent are you satisfied with the (activity/content of the activity)? • Extremely satisfied • Fairly satisfied • Neither satisfied nor dissatisfied • Fairly dissatisfied • Dissatisfied • Do not know
RELATIONSHIPS (PREREQUISITES FOR CREATING RELATIONSHIPS)	Proportion of participants who consider that the activity has created prerequisites for them to establish relationships with (people or potential partners who are relevant to the topic of the activity). Chosen according to what is relevant regarding the activity – other participants – potential Swedish partners – potential foreign partners.	Aktiviteten har skapat bra förutsättningar för att etablera relationer med (relevant part): • Instämmer helt • Instämmer delvis • Varken eller • Instämmer inte • Instämmer inte alls • Vet ej	The activity has created good opportunities to establish relationships with (relevant partners/ people)? • Strongly agree • Partly agree • Neither agree nor disagree • Disagree • Strongly disagree • Do not know
RELATIONSHIPS (ACTIVE). MEASURED AT LEAST SIX MONTHS AFTER THE END OF THE ACTIVITY.	Proportion of participants: who X months after the end of the activity state that during the activity they have established relationships/networks that they use actively to explore questions regarding (topic of the activity): The topic is related to the focus of the activity, e.g. * MR * Democracy* CSR * Environmental issues	I vilken grad använder du de relationer/nätverk som du utvecklat genom ditt deltagande i (namn på aktiviteten) i ditt arbete med (ämnesinriktning på aktiviteten)? • I mycket hög grad • I hög grad • Varken i hög eller låg grad • I låg grad • Inte alls • Vet ej	To what extent do you actively use the relationships and networks that you have developed through your participation in (the activity/ project)? • A very great deal • A great deal • Somewhat • Not much • Not at all • Do not know

CASE
01

CASE 1: CONTEXT ANALYSIS AND TARGET GROUP ANALYSIS FOR DESIGNING RELEVANT ACTIVITIES WITH POSITIVE IMPACTS

Activities were arranged at the embassy in Washington DC on the theme of Infrastructure & Intelligent Mobility with a focus on sustainable transport systems, digital infrastructure and internet security, as well as strategies to combine ambitious climate policy with strong economic growth. The overall purpose of the activities was to promote Swedish technology and highlight Swedish companies in the field, e.g. design solutions for green vehicles.

The planning work began with an analysis of context, needs and target group. On the basis of this analysis the following could be ascertained:

On the basis of the US context: In the US the energy question and that of the country's dependence on imports are highly relevant; there is value in linking the climate and energy issue to job creation and energy security; national infrastructure projects are currently taking place with the aim of emerging from the economic crisis; American companies have shown an interest in new technical solutions.

On the basis of the Swedish context: Interest in increasing GNP and working to reduce carbon dioxide emissions; best practice to spread in the area of sustainable urban development (e.g. Hammarby sjöstad); Sweden is a trailblazer on legislation/policy in the field and can thus offer best practice; and Swedish companies can offer expertise and solutions.

Partners were:

- Business Sweden, the Ministry of the Environment, the Ministry of Culture, Growth Analysis, the Swedish Transport Administration, the Delegation for Sustainable Cities, Luleå University, the Architecture Museum ArkDes, Hammarby sjöstad
- Volvo Group, SAAB Group, Clinton Climate Initiative, Brookings Inst., Urban Land Inst., Georgetown Univ., Green Building Council–DC, American Trucking Association-DC, SACC –DC

The purpose of selecting these partners was to improve quality, ensure that the right target group was invited in and that the different partners were able to offer direct contact with the target group.

Within the remit of the activity three exhibitions were held, along with seven seminars, a Pecha Kucha night, two science cafés, a gingerbread exhibition depicting infrastructure, and a demonstration of Baldos 2 – Sweden's most fuel-efficient car.

CASE 2: EXAMPLE OF SPECIFIC AND MEASURABLE GOALS FOR AN ACTIVITY

CASE
02

Example: A seminar in ICT (Information and Communication Technology) geared towards the target group of Swedish ICT companies, potential customers and representatives of government agencies. The partners were Business Sweden, chambers of commerce and local partners comprising a local ICT industry organisation and an NGO (Non-Governmental Organisation) in ICT. The following goals were formulated for this activity:

- Quantitative goals: 10 Swedish companies and at least 20 Swedish companies/purchasers/representatives of agencies participate
- Qualitative goals: 75 % of Swedish companies must consider that they gained relevant information and forged valuable contacts.

One long-term goal may be that a certain number of contracts have been entered into, a certain number of cooperative arrangements have come about or that a certain number of companies have had the opportunity to enter the new market.

CASE 3: EXAMPLE OF AN IMPACT CHAIN

CASE
03

Example from the embassy in Washington DC. The activity consisted of a number of events aimed at promoting cooperation in the car industry and promoting the image of Sweden abroad. The project process included a needs analysis and a target group analysis. Furthermore, a purpose and clear goals were formulated. On the basis of this work, project logic for the activity might look like this:

ACTIVITY	SHORT-TERM IMPACTS	MEDIUM-TERM IMPACTS	LONG-TERM IMPACTS
Activities related to the theme of Infrastructure & Intelligent Mobility; seminars, exhibitions, including Sweden's most energy-efficient car	Greater level of knowledge of Swedish companies' solutions. Networking opportunity. Journalists gain greater knowledge.	Business discussions begun. Media attention.	At least five new collaborations. Boosting Sweden's image as a country of progress in environmentally friendly and sustainable transport.

CASE
04

CASE 4:
MONITORING A PROJECT USING QUANTIFIED GOALS

The activity consisted of a broad programme for different target groups in connection with the Swedish Institute and the Living History Forum's exhibition on Raoul Wallenberg in conjunction with Raoul Wallenberg Year in 2012. The activity was carried out in partnership with a number of foundations and organisations associated with German heritage. The goals of the activity included:

- spreading and increasing knowledge of Raoul Wallenberg and his heroism among Germans, and
- highlighting Raoul Wallenberg as a source of inspiration and role model alongside the myth and the hero.

Monitoring the activities included counting and evaluating the number of visitors, measuring media impact and gathering information on the non-quantifiable goals from a number of sources:

- A guest book set out in the exhibition in which visitors could write thoughts and comments.
- Marks from teachers to the pupils participating in the conference.
- Letters to the ambassador from various German partners

The above sources confirmed that the project had touched people with its message, provided the pupils with new knowledge and inspired commitment and satisfaction among partners. The goals were thus judged to be met. The results of the media analysis also showed that both German and Swedish newspapers had reported on the project. They were thus able to ascertain that the project had succeeded well in meeting the goal of spreading and increasing awareness.

CASE 5: DEMOCREATIVITY – MONITORING SHORT-TERM AND LONG-TERM IMPACTS

CASE
05

BACKGROUND, PURPOSE & TARGET GROUP

To strengthen the image of Sweden abroad as an open and creative country, VisitSweden, the Swedish Institute and Business Sweden launched the pilot project Democreativity. The games industry was used as a creative sector and the concept was based on inviting outsiders to contribute under-represented games concepts. The goals of the project were to create reach and relevance for the message and both long-term and short-term impacts in the target group, and to evaluate the potential of project collaboration in NSU. The communication channel comprised people with large networks through which they can spread messages (known as Connectors). The choice of channel was based on the idea that this is a group with the opportunity to influence the wider public, which is the final target group, through its broad network of contacts.

MONITORING & GOAL

External and internal monitoring were carried out within the remit of the activity. For external monitoring the following impacts/goals had been formulated:

Long-term impact: A stronger image of Sweden abroad as a creative country.
Measurement method: Quantitative Brand Tracking in which the following attributes are tracked: Awareness of Democreativity and image variables such as New Technology & Innovation, Openness & Freedom and New Ideas & Progressiveness.
The long-term changes are tracked but it is not possible to directly attribute them to an individual activity.

Short-term impacts: Involvement, spread, message relevance.
Measurement method: Media analysis of the spread and understanding of the message, monitoring and gathering of Twitter data, and qualitative evaluation of the extent to which the impacts mention the term "Democreativity" and whether they are positive or neutral in tone.

On the basis of these goals and measurement methods, the impacts of the project could be measured in terms of visibility and strength of the message and to what extent the activity worked as a method.

Furthermore internal monitoring was carried out to evaluate the process: How the nation branding strategy worked organisationally within NSU, how the project plan worked, how the budget was spent and how the schedule worked. This was done through a survey sent to those involved at NSU, a desk survey and qualitative evaluation in the project group. Examples of questions: Did the project concept emerge from the context and target group analysis? Did the work take place in dialogue with partners and the key target group? Were methods and parameters designed jointly?

EVALUATION & LESSONS LEARNED

The overall conclusions were that the activity was spread widely and received a positive response. Cooperation, the concept and its relevance to the operations of the different organisers were viewed positively. It also emerged that the anchoring process between the organisations, the project group and the definition of Connectors should be clarified further, earlier in the process.

CASE 6: MONITORING AND ATTAINING GOOD RESULTS AND SIMULTANEOUSLY IDENTIFYING AREAS FOR IMPROVEMENT

CASE 06

Re Present: Scandinavian fashion collective & showroom A/W14 showcased Scandinavian brands during London Fashion Week. A series of dialogues was also held in conjunction with Fashion Week and was included in the official programme. A launch party and a separate reception were also arranged.

The purpose of the project was to promote Swedish fashion in a unique and attractive environment as part of a shared Scandinavian platform, thus making it easier for fashion brands to meet influential buyers and fashion journalists in the UK. The target group for Re Present was primarily British buyers and the fashion press. Carefully selected purchasers and journalists with a particular interest in Scandinavian fashion were informed at an early stage and repeatedly prior to the opening of Re Present. Purchasers were also given the chance to pre-book meetings with exhibiting companies.

What was monitored to assess whether the goals were met? Purchasers were also given the chance to pre-book meetings with exhibiting companies.

- No. of visitors
- Assessment of which target group the visitors represented (e.g. buyers and influential members of the press)
- The verdicts of visitors though an on-site survey
- Media impact
- Contacts and any future collaboration

The result of the showroom was greater knowledge among participants and the establishment of networks in the British fashion industry, with certain exhibitors receiving actual orders at the time or booking sales meetings for Paris Fashion Week, which immediately followed the British event. The exhibition and series of dialogues resulted in effective promotion work as it helped to contextualise and present a broader, more multifaceted picture of Scandinavian fashion.

Example of lessons learned from monitoring:

- A certain amount of criticism was expressed in terms of opportunities for interaction between exhibitors and visitors.
- Social media plays an important role in creating general interest, which is important to bear in mind for future activities.
- Many of the smaller companies that participated had expected actual sales on the spot and some were disappointed when this did not happen. The reaction after the event shows the need to be even clearer about what the event involves and that investigating the maturity of the companies for potential establishment abroad should be considered, as should their resources to handle the British market.

CASE 7: PROCESS EVALUATION

CASE
07

To illustrate the kind of analyses that can be carried out in a process evaluation, the event at the embassy in Washington DC (presented in the introduction to this handbook) will serve as a good example.
The event was judged to be very successful. The monitoring showed that this success was due to the following factors:

- Choosing a theme that made it possible to work with integrated promotion as many different forms of activity could be offered (exhibition, fairs, seminars, etc.)
- The partnership offered a broader platform that made it possible to stand out amid tough competition in DC.
- A sufficiently focussed theme, which meant that the companies saw a reason to participate.
- A relatively niche theme, making external communication easier.
- Holding certain seminars in conjunction with fairs.
- A goal analysis on the basis of needs helped to meet what was demanded in the country and by its companies while also being based on what Sweden and Swedish companies can offer.
- The theme included measurable goals, which set out both quality and quantity.
- A communication strategy had been produced.
- A well conceived activity plan with goals, target groups, partners, local partners, budgets and project managers paved the way for successful implementation.

EVALUATION & LESSONS LEARNED

The overall conclusions were that the activity was spread widely and received a positive response. Cooperation, the concept and its relevance to the operations of the different organisers were viewed positively. It also emerged that the anchoring process between the organisations, the project group and the definition of Connectors should be clarified further, earlier in the process.