

CHARTERED INSTITUTE
OF PUBLIC RELATIONS

GUIDE TO SOCIAL MEDIA MONITORING

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INTRODUCTION

The increasing importance of social media in helping set and shape the news agenda as well as influence public behaviour means more and more public relations (PR) professionals are taking an interest in understanding how it can impact on organisational reputation. Making sense of this socially mediated world, however, poses a number of challenges to those seeking to stay abreast of and proactively manage organisational issues. It is no exaggeration to suggest that the sheer volume of social media conversations and online content being produced and the speed with and scale on which it is distributed is something that has never been witnessed before now. Sysomos, a leading social media monitoring and analytics company claims to gather “more than 16 million new posts every hour, from sources including blogs, forums, news sites, Twitter, YouTube, Facebook, Flickr, LinkedIn and numerous other social network services.”¹

To help organisations cope with this explosion of information an ever-increasing range of tools and services have emerged designed to help organisations track and help analyse the vast quantity of social media content and conversations being produced. The quantity and quality of these social media monitoring (SMM) tools and services on offer has changed dramatically over the past five years. From a relatively small number of free but often unreliable online services or commercial tools operated primarily by start-up technology companies the industry has matured swiftly – both through rapid innovation and acquisitions by large, established businesses, such as Google, Salesforce and Marketwire.² Such a transformation has made social media monitoring an increasingly professional, reliable and powerful asset for organisations wishing to stay abreast of and actively manage their social reputation. It has also, however, created a highly complicated and diverse landscape for buyers and professionals wanting to invest time, money and knowledge in identifying and using the most appropriate tool for their needs.

¹ Social media monitoring made easy with Sysomos, Sysomos, <http://www.sysomos.com/social-media-monitoring/>

² Social Media Monitoring Services Report, April 2012 Edition, Ciper, <http://www.cipher-sys.com/Cipher%20Social%20Media%20Monitoring%20Providers%20final2012.pdf>

It is no surprise then that in a recent report the business intelligence consultancy, Ideya, identified approximately 250 social media monitoring tools on offer, spanning a range of different commercial models and specialisms. Their report concluded: "Selecting the right social media monitoring tools is now a challenging task for organisations as social media technology business has branched out into a diverse set of technologies, data types and countless vendors. New tools and services are emerging continually, while already established SMM companies are frequently improving their products by introducing new features to accommodate their clients' specific needs."³

This potentially confusing reality is something that CIPR members have also expressed to the organisation. In a recent survey of members' needs, the most popular response by far was for best practice guidance on social media, with analysis and measurement receiving specific mention. And again in its *State of the Profession 2013* report, members also identified managing social and digital media as being the biggest future challenges they faced.

It is in this context that this guide has been developed. It aims to provide a concise and useful starting place for PR practitioners wanting to understand the range and potential benefits of different social media monitoring tools and service. While it aims to be as comprehensive as possible, it is impractical to capture every aspect of such a rapidly changing commercial and technological field. Recognising this reality, the guide will focus on the following elements:

- What is social media monitoring and why should PR professionals start monitoring?
- What are the different pricing models of social media monitoring tools?
- A list and profile of key social media monitoring tools (including free providers)
- How organisations can get the most out of social media monitoring by establishing workflows to help implement and manage insights
- This guide focuses on social media monitoring tools, as opposed to dedicated analytics packages, content management tools, and engagement platforms.⁴

³ Social Media Monitoring Tools and Services Report 2013, Ideya, <http://www.slideshare.net/croakun/smm-tools-report-excerpts-09072012final>

⁴ It is envisaged that these related areas of social media analysis and management may become the subject of future guides from the CIPR Social Media Panel

WHAT IS SOCIAL MEDIA MONITORING (AND WHAT ISN'T)?

It is important to distinguish between monitoring social media on the one hand, and analysing what has been said about you on the other hand. The aim of doing them in unison is to gain actionable insights that help inform your communication strategy.

A simple definition of social media monitoring is: the detection of when and where your brand has been mentioned on the web. By contrast a simple definition of social media analytics is: the ability to understand what's being said about your brand, including the frequency of mentions, the reach of mentions, the influence of those sources and the sentiment felt towards the brand.

Monitoring in its simplest form is both an art and science. For many PR professionals it was first made popular by the ability to set Google Alerts five or six years ago. There are now dozens of tools available, both free and paid for that can enable PR professionals to track their brands online in close to real time (see section 5 for an overview of providers).

Social media monitoring of your brand can be focused solely on established, self-contained social media channels like Twitter, Facebook or YouTube, or it can include mentions of the brand across the web including discussion boards, threads within forums, blogs, or the comments sections of online news sites, such as Mail Online or Guardian Online.

Most monitoring tools use key words or sequences of words to scan RSS feeds⁵ or to crawl thousands of websites looking for matches. While they use technologically complex tools, such as custom-built web spiders and proprietary search engines, the ultimate aim of social media monitoring is to discover all the content relevant to an organisation, brand or specific issue in a timely fashion.

⁵ RSS, Wikipedia, <http://en.wikipedia.org/wiki/Rss>

The wider the search is cast, however, the more content is returned. With the potential for large volumes of social media content to be identified it becomes essential to identify and remove unnecessary or irrelevant mentions to allow for a meaningful analysis to take place. Many commercial monitoring tools provide this as core functionality of their technology, while free tools require manual evaluation for spam content.

Similarly, many commercial providers offer automated sentiment analysis which can be useful for brands with high volumes of social media content. However, automated analysis often can be unreliable and so human intervention and manual evaluation remains an important activity of any brand's monitoring toolkit.

The ability to return meaningful results can also vary dramatically depending on the key words or terms used to search for social media content. For instance a search term such as 'Asda', refers to both the UK-based supermarket, the Adriatic Sea Defence and Aerospace 2013 exhibition, and the American Student Dental Association. Other brands are even more generic than others and so taking time to create relevant search terms and removing inappropriate content is essential to ensure monitoring tools return high quality results.

Given these complex variables, no monitoring system is ever fail safe and smart PR professionals will always ensure their internal stakeholders are aware of these limitations. That said, in recent years the PR professional's ability to spot and deal with issues before they escalate into crises has been greatly aided by social media monitoring.

For example, at the sharp end of social media monitoring, brands are able to conduct real time detection and instant analysis. For many brands this immediacy is essential to ensure they are effectively managing their reputations. However, it should be noted that while automated tools are great at setting off an alarm, an experienced human eye is often needed to ensure it is not a false alarm. Once again, manual evaluation is key to preventing needless action being taken or the wrong conclusions jumped to.

Less time-sensitive analysis enables brands to gather together content over an extended period of time which can then be plugged into an analytical system or sentiment analysis

tool - either part of a commercial package or separate online platforms - to elicit key trends and swings in consumer behaviour. This type of data analysis is best used in order to derive clear, actionable insights for the brand.

An often ignored element of social media monitoring is the assessment of impact. Amid all the online noise one of the most important things to do is to clarify, quantitatively and qualitatively, just how influential the noise is. If ten per cent of 5,000 voices are all shouting about one thing, it's important to deal with that one thing, but balance it against all the mentions. At the same time it is important to recognise a single voice in a crowd of 5,000 could have more impact than all the rest put together. Influence is a combination of statistical analysis and human judgement.

Finally, careful thought should be given in advance to social media monitoring and analysis in terms of how the organisation will react, if at all, to what is found. Creating organisational work flow tools are an increasingly important element of social media monitoring and can dictate how information moves effectively through an organisation. Smooth lines of communication with other functions in the business such as PR (if you are not within PR), customer services or marketing are absolutely paramount, as are clear lines of accountability. Understanding the touch points and hand over points is almost as important as spotting the content in the first place, as institutional inertia or simple duplication of effort can exacerbate the issue rather than fix it (see section 6 for more on creating workflows).

In most cases it is wise to follow a three step approach: listen, engage and influence. Listening through monitoring can establish relatively quickly how often your brand is referenced, and how many of those mentions are significant. Spotting customers in distress and swiftly passing those to a customer service team empowered to help is a good starting point. Spotting and harnessing positive opportunities can then quickly follow. Beginning a programme of outward engagement informed by monitoring and analysis can lead to effective community building.

WHY MONITOR SOCIAL MEDIA?

Do you *really* need a business case?

It seems a rather quaint idea that brands and organisations should have to go through the process of creating a business case for monitoring social media. After all:

- How long ago did your organisation create a business case for having a contact number on your marketing materials and web site or a customer service email/number?
- Did you have a board meeting to allow your communications team to read, watch or listen to media for industry information and your brand or competitor mentions?
- How did you decide that using customer focus and test groups to trial new products/services warranted investment?

These are fundamental decisions for organisations wanting to listen to people who could make a positive or negative impact on their reputation, profitability and longevity.

Customers have never been passive but there has been a dramatic shift in consumer behaviour - they are increasingly choosing social media to vent, expecting timely and public responses from organisations. Equally, customers can be passionate and vocal brand supporters and organisations tuned in to the positive things that they have to say can understand more about what are the successful elements of their brands, products or services.

The reality is that any organisation wishing to be market-orientated, competitive and customer focused in today's economy should not have to create a business case for any opportunity to listen to its stakeholders. Most importantly, it must be prepared to do something with the insights that it gains from listening.

What are the benefits of social monitoring and how can I build a business case?

The benefits of using a mix of techniques to effectively listen to, track and quantify those things being said about you and your competitors are manifold for companies, regardless of size. The process will be easier for some than others and depends on many factors including audience size, location, language and the platforms where conversations are taking place.

An effective approach is to create a business case that includes business benefits and considers objectives from across the organisation. Table 1 sets out some typical social media listening objectives from organisations with a mature approach to monitoring.

Table 1 - Example organisational objectives for social media monitoring

Organisational team	Example monitoring objectives
Communications team	<ul style="list-style-type: none">• Identify risks and issues at an early stage• Identify existing and emerging influential online voices• Benchmark and measure sentiment (against competitors)
Marketing Team	<ul style="list-style-type: none">• Test effectiveness of creatives/campaigns• Pre-test celebrity sentiment before endorsement (ASOS)• Benchmark and measure share of voice• Monitoring for industry trends• Identify relevant emergent social media platforms

Sales Team	<ul style="list-style-type: none"> ● Identify potential business generation leads ● Identify customer dissatisfaction ● Identify purchase considerations and help with customer journey mapping
Research & Development Team	<ul style="list-style-type: none"> ● Improve product/service development ● Identify gaps in the market
Human Resources/Learning & Development Team	<ul style="list-style-type: none"> ● Identify potential candidates ● Monitor competitor recruitment and L&D activity
Customer Service Team	<ul style="list-style-type: none"> ● Spot positive and negative trends beyond direct customer contact ● Identify risks and potential issues at an early stage

These are a handful of objectives from a selection of departments. Start to apply your own business and departmental objectives to your challenges and the business case becomes obvious doesn't it? However, there is a significant business cost. Free monitoring tools exist but using them means that organisations run the risk of missing vital comments and monitoring a wide range of online and emerging social media platforms. Using those free tools will also tie up resource and are usually a false economy as the quality of the data is often poor and their analytics tools limited.

Enterprise monitoring tools are still in their infancy but require significant tool and resource investment. Most companies are now beyond the experimental stage with social media and are focusing on optimising their social activity, including understanding how nuggets from social data can feed into actionable insights for the business. Organisations regarded as having mature social monitoring strategies and processes have been doing this at an enterprise level for 7-8 years.

Who is best placed to monitor social media?

The answer can be determined by asking: Why are you doing this and what do you want to gain from monitoring? How are you managing the monitoring - analysis - action elements of your social monitoring strategy? What are you prepared to do with the insights that you gain? Who is best placed to create the most value for the business with the insights that they uncover?

Many organisations that have been monitoring social media for a considerable period of time have evolved their objectives and how monitoring, analysis and action is resourced. Many have devolved responsibility from an individual in the digital, marketing or communications team, who might have used an agency or social media monitoring for a single marcomms purpose, through to a separate team staffed by team members with wider objectives and a blend of customer service, communication and analytics skills.

The 3 most common resourcing scenarios are:

1. Resource is an issue for the organisation so monitoring is done by an external agency/consultant with agreed monitoring hours and responses/workflows.
2. Monitoring is done in-house by individual or individuals on a rota system such as a community manager or social media manager with agreed monitoring hours and responses/workflows.
3. Some organisations split the responsibilities between monitoring/workflow (i.e. ensuring that urgent comments/conversations are identified, contextualised and trafficked to others in the organisation - See section) and analytics/insight (i.e. summary of deep qualitative findings and possible recommendations for a senior team to review and action).

Dell are an example of one of the most mature social businesses and they have evolved their social listening into a team monitoring 25,000+ mentions of their products and services in any one day in 11 languages. The Dell Social Media Command Center⁶ is a small

⁶ Dell Social Media Command Center; Dell; <http://www.dell.com/Learn/us/en/uscorp1/videos-en/Documents-dell-social-media-command-center.aspx?c=us&l=en&s=corp>

team using Radian 6 based monitoring tools, but more importantly, categorisation and prioritisation workflows and processes to ensure that appropriate comments are escalated when necessary and sent to the appropriate country, team, department to act upon. Their social media monitoring mantra is: Listen, Engage, Act.

London2012's small team of specialist social media analysts with a blend of research and PR skills monitored millions of conversations a day using a blend of monitoring, visualisation and analytics tools. They analysed in real time, providing instant highlights to the media centre in the Olympic Park and prioritised and trafficked issues for nominated team members from LOCOG and support organisations to act upon.

Where do I start?

When starting your social media monitoring journey, create clear objectives by looking at overall business objectives and departmental objectives. Create a workable way of categorising and prioritising online conversations and comments that need to be actioned quickly, and consider what more in-depth and longer term insights are required from the data and how they should be reported and followed up. The best monitoring tool providers will review your objectives and assist with the set up a workable solution. Some will also provide initial training for staff and a review to ensure that the tool is working to your best advantage.

MONITORING TOOLS: COSTS AND PRICING MODELS

Although the features and functionality of social media monitoring technology is evolving consistently, most commercial tools have developed three main pricing models. This section will provide a short overview of the three models considering their pros and cons (See Table 2).

Table 2 – Social media monitoring tools standard pricing models

Pricing type	Description	Pros	Cons
Volume based	Volume based pricing models charge users to access a set amount of social media data according to how much you pay. For example, a fixed monthly fee of £500 might allow you to access 3,000 results spread across the month. If your search terms are likely to push you over your data cap you are usually alerted and given the opportunity to move to the next pricing band.	Good for practitioners who want the ability to access high quality data and undertake robust analysis but know that their organisation or particular issue is unlikely to generate mass appeal or interest. Additionally, you can monitor different issues by changing your search terms as often as you like, providing you don't exceed your data cap.	If your social media strategy starts to work and volumes of discussion increase incrementally, an initially low-cost service may become costly requiring greater investment or the inconvenience of switching to another monitoring provider. Unexpected crises creating a sudden burst of high-volume conversations which it is essential to access might also boost costs.

<p>Search based</p>	<p>Search based tools enable you to access as much data as is necessary but users are limited to specified amount of searches. For example, if you want to monitor what people are saying about your brand and two of its products you might need to run three separate searches. If your monitoring tool limits you to two searches then you might not be able to monitor all the areas you require. Tools using this pricing model usually offer a minimum number of searches and allow you to expand the number of searches by increasing the monthly cost.</p>	<p>This model provides instant access to an unlimited range of data ensuring users don't miss essential conversations if the volume of data increases.</p>	<p>While you gain access to complete data, you are limited to what you can search for. Some tools require a high number of searches as a minimum which means that if you only want to monitor a limited number of topics makes this pricing model unattractive.</p>
<p>Flat rate</p>	<p>Monitoring tools using a flat rate pricing model effectively charge users per login. They allow users access to the full range of data available and allow you to run as many searches as you like but only a limited number of people can access the tool at one time.</p>	<p>The flexibility of these types of tools mean you can monitor a wide range of topics - ideal for agencies with multiple clients or large in-house teams with a wide portfolio. It also enables you to undertake a wide range of exploratory analysis to help gain a complete picture of the social media environment before finalising your monitoring set-up.</p>	<p>With pricing based on capping user numbers, the functional benefits of such tools are limited to a small number of people. Attempting to bypass the user limits by sharing logins is counterproductive as being 'kicked out' of the tool by another user whilst setting up a complex monitoring project is highly frustrating and unproductive.</p>

PROFILES OF KEY MONITORING TOOLS

This section provides short overviews of a selection of social media monitoring tools used by authors of this guide. It should be noted that these synopses should not be read as explicit recommendations or endorsements of particular tools, either by the CIPR or authors of this guide. A more complete list of monitoring tools can be found in the *Appendix*.

Additionally, it should be noted that many tools offer a range of different functionality - often overlapping with other services and technologies. This guide covers those tools that offer social media monitoring as their primary function, as opposed to other platforms, such as social media engagement tools (e.g. Tweetdeck, Hootsuite, CoTweet), social media content management tools (e.g. Sprinklr, Timely) or social media analytics tools (e.g. Socialbakers, Wildfire).⁷

Brandwatch

[Brandwatch](#) is a mid-level cost, powerful monitoring and analytics tool and was developed in the UK. It has a very responsive customer team and all customers are assigned an account manager, which is critical for organisations looking to set up social media monitoring for the first time. It “supports and powers social analytics and intelligence across the enterprise, enabling brands and agencies to monitor and identify key insights from the social web to make smarter business decisions.”

Brandwatch is a Twitter certified product and has access to the Twitter firehose. It also covers Facebook, YouTube, Google+ and Pinterest but has more limited coverage of LinkedIn. It tracks all major social networks (including region-specific ones like Weibo), forums, news sites, blogs and so on, totalling over 65m sources a day. It delivers broad coverage of online conversations and interactions, comprehensive analysis at author, topic and channels levels, and a configurable user experience that can be easily adapted to

⁷ A more detailed account of the difference between these tools and examples of providers can be found in the blog post ‘How to Evaluate and Compare Social Media Tools’ - <http://blog.hubspot.com/blog/tabid/6307/bid/29343/How-to-Evaluate-and-Compare-Social-Media-Tools.aspx>

multiple use cases. Like its competitors, the accuracy rate of its automated sentiment is around 70% but users could use this tool, and a tool like Kred, or a combination of other automated influence scores, to help surface potentially influential comment sources.

Brandwatch's real strength is its powerful search and filtering tools. It is powered by queries which can either be 'free text' for Boolean experts or the more simple 'structured queries' for those of us who need a little more help making searches more relevant. The useful 'preview' feature allows users to check and filter monitoring results and refine their search. The data filtering tools are easy to use and there are simple ways of exporting data to excel and CSV for even more 'slicing and dicing' and analysis. The charting tools provided tend to provide enough visual information for most organisations. For entry level users query data can be backfilled for a month, for premium users this can extend to 2 years.

A new development for 2013 is 'Channels', which lets organisations track their owned communities on social media platforms, initially for Facebook only but other platforms will follow. Being able to track earned conversations and owned capabilities within one platform means that users can compare the two and understand the relationship between them, including when increased activity in owned communities (tweets, status updates etc) filters onto other platforms. Users can do this for any Facebook page, meaning like-for-like competitor tracking is possible. Brandwatch's workflow functions allow comments to be assigned by an administrator to team members and can be categorised and assigned priority levels. Perfect for cross-departmental issue resolution and tracking.

Cymfony / Visible Edge

Cymfony was purchased by Visible Technologies in 2012 and what was the Cymfony Maestro tool is now called [Visible Edge](#). Visible Edge is an enterprise level monitoring solution, which forms the foundation of Visible's suite of social media analysis tools. The software adds millions of both traditional and social mentions each day and offers a useful linguistic analysis allowing for brand monitoring across multiple territories. The platform is highly sophisticated in terms of analysis with the ability for users to create multiple dashboards of metrics most relevant to them for easy and frequent monitoring. Along with

other useful functionality, users can create campaign timelines; tracking brand, topic and competitor mentions which can be utilised to assess the effectiveness of marketing activity. This is a higher-end solution and as such sentiment analysis is slightly more advanced than other tools on the market, but may still require some manual interpretation.

Meltwater Buzz

[Meltwater Buzz](#) has undergone some significant changes in the last year or so. The data sourcing and handling aspect of the software always appeared to be very strong but the front end wasn't very user friendly and didn't allow users to provide the strong charts visuals available via other monitoring tools.

The visual outputs whilst still not the best available are vastly improved and more than acceptable for most reports. There is also an option to export data to excel which will allow you to do whatever you need to in terms of segmenting and turning into creative graphs. Meltwater Buzz is fairly user friendly with lots of keyword options. It also has a nice feature which allows you to preview the results when you are setting up the campaign. If you don't like what you see you can adjust the filters; for example by social media channel, language or geography. The software tracks conversation volume, sentiment, and trends. Meltwater indexes the data that it tracks so you can research historical discussions going back six months.

The search element is sophisticated and efficient probably at least in part due to the fact that Meltwater acquires and incorporated IceRocket a dedicated search engine into the product. Meltwater Buzz indexes content from Twitter, Facebook, blogs, forums, reviews, and more so the sources are comprehensive and the database holds content for up to six months which is incredibly useful if you need to track events or campaigns that have already happened.

Radian6

Although now part of the [Salesforce Marketing Cloud](#) and with an engagement console, Radian6 is at heart a robust, easy to use and straightforward monitoring tool. It attempts to

pull in 'everything' online, which means it includes access to all tweets and any content it can crawl that is not hidden away behind paywalls, registration requirements and the like. That means much of the content on Facebook is missed (as is the case for its rivals too). The paywall caveat means that there is some potentially very important content, especially from newspaper websites, that does not come up in its searches. Radian6 comes with a very comprehensive set of online videos that step you through how to use the system. For those who prefer to learn this way, this is a major plus.

Data can be pulled out in a variety of ways, including handy pdf reports, email alerts and raw data CSV downloads for external analysis and reporting. Automated sentiment analysis is also available, with the c.70% accuracy typical in the industry. The major difference between Radian6 and its rivals is its cost structure. For a relatively low license fee, you can set up any number of short term searches without incurring extra costs. It is only if you want to carry on using a search in the long term that you have to pay extra. That makes Radian6 very useful for one-off event monitoring, new business research and so on.

SM2 Alterian

[SM2](#) is an extremely sophisticated monitoring tool that enables you to set up detailed listening profiles for a variety of key words. The analytics functionality is comprehensive allowing you to set up a wide variety of reports that are easy to download and share. A useful function is the ability to set up real time dashboards showing conversation volumes, sentiment, share of voice, trends, spikes and competitor trends. The dashboards are read only (i.e. not necessarily allowing you to drill down into potentially interesting or unusual data) but they can be shared with a wide range of people on mobile and desktop devices making client and managerial reporting quick and easy. SM2's sentiment functionality, like most tools, cannot be relied upon and should be evaluated manually, although it does allow users to permanently amend results for more accurate automated analysis.

Sysomos Heartbeat

[Heartbeat](#) is Sysomos' real-time social media monitoring tool which is relatively easy to set up and provides a clear dashboard displaying real-time results. It claims to gather more

than 16 million social media conversations each hour every from a comprehensive range of sources that includes blogs, forums, news sites, Twitter, YouTube, Facebook, Flickr, LinkedIn and other smaller social networks. Crucially, Sysomos has access to Twitter's 'firehose' data which means that every single tweet published is available. This is important as Twitter limits the amount of tweets available publicly meaning it can sometimes be difficult to get a full picture of events from Twitter users.

Sysomos enables users to analyse social media according to geographic area, user demographics, such as age, gender and profession as well as identify 'social media influencers'. These services, however, only really work where a significant amount of relevant information is available. Heartbeat offers automated sentiment analysis with 70% accuracy, although this service is not always reliable and better used in conjunction with manual analysis whereby users can override the automated results by manually coding conversations for a more accurate sentiment analysis. Heartbeat also removes duplicated results or results it believes are spam to ensure monitoring data is accurate and relevant. Search results are fully downloadable in a variety of formats, most usefully as CSV files which can be used for further manual analysis or to create charts and visualise data.

Precise MP+ Social

[Precise's MP+ Social](#) is part of a wider monitoring and analytics platform that integrates social media and mainstream news in a single timeline - enabling users to more quickly and easily identify and share relevant contacts, coverage, analysis and insights.

MP+ Social provides real-time access to coverage from all social media channels - Facebook, Twitter, YouTube, blogs and forums - to quickly identify the most influential content and the impact of social content.

The platform also includes a Real-time Interactive Presentation Layer (RIPL) providing a live visual analysis of the topics, themes and issues driving coverage and profile. On top of this, effective workflow tools, from analytics charts and dashboards to automated sentiment analysis, make it straightforward to create and share reports and presentations on both mainstream and social content.

CREATING SOCIAL MEDIA MONITORING WORKFLOWS

Communications is a busy old job. Communicators can't just pick up the newspapers anymore to stay on top of who's talking about their brand and how. Social media gives brands the opportunity to hold a glass to the world's biggest conversation. But with millions upon millions of thoughts, feelings, reviews, rebuttals, accusations and opinions buzzing around the internet, how can communicators ensure their engagement strategy is robust, considered, consistent and reportable to the wider organisation?

Business objectives

As with all communication activity, your social media engagement should be linked to your business objectives. The specific strategic areas of focus for your organisation will inform everything from your tone to your roles and responsibilities and your scheduling (see Table 3).

Table 3 - Aligning Business Objectives and Social Media Engagement

Objective	Tone	Roles	Schedule
Customer service	Helpful	Linked to customer team	24 hour

Roles and responsibilities

With your objectives in place the next step is to build your team. Ensure there are clear roles within the team with responsibilities clearly defined and expectations set. For example, your team may consist of:

- Community Manager who oversees strategy
- Community Engagers who track and engage in conversations
- Content Creators who focus on creating shareable content e.g. infographics, video
- Analysts who make sense of sentiment and liaise with Managers on the impact this has on strategy.

Each team will be bespoke to the particular organisation's objectives, capacity and expected levels of engagement from the community. As long as boundaries are set and protocols observed (e.g. do Community Managers need to sign off content before Community Engagers can post?), you should have a well-briefed team ready to engage with the community.

Scheduling

Monitoring social media is a round-the-clock job. Work out what your hours of operation are and let the community know. Again, these should correspond with your business objectives (e.g. if you're an airline, you'll likely want 24 hour cover to respond to customer requests). A simple line in your Twitter biography saying "tweets are responded to within the hours of 9am-6pm Mon-Fri" sets expectations of your response. Once you've decided on your hours of operation, create a rota which ensures your 'business' hours are covered off.

Response times

Social media happens in real time and certain requests are often dependent on an immediate response. Determine minimum responses times for each network or type of online activity e.g. Twitter 30 minutes; Facebook 1 hour; Google+ 2 hours.

Tone

Social media shouldn't be seen as an opportunity to create a new persona who wouldn't be seen dead talking to your corporate image. As part of an integrated communications strategy, your social media tone should dovetail with your other platforms, albeit tailored for 140 characters or Google+ posts. If your organisation's image is professional and the language it uses in its communications corporate, reflect this in your social media tone. No-one wants to chat online with a try-hard 'hip' accountant; it detracts from the service offering to your target audience. Just as you wouldn't turn up to a party and dive two feet first into the conversation without judging the tone and content of the chatter (and if you would, you shouldn't), take the same approach to your online tone. Take time to listen to the conversations of your target audiences and note how they differ across different

networks. Factor this in when setting your online tone. Once you've taken all of this into consideration, put together a style guide which covers key messages, tone, blacklisted words (e.g. profanity) etc.

What to listen for

Chapter 5 of this Guide, *Profiles of Key Monitoring Tools*, is designed to give an insight into which social media monitoring tool best suits the needs of your brand, while a more comprehensive list of tools can be found in the *Appendix*. Once you've decided which monitoring tool to use, the next decision is on what to listen to and engage with. Think about keywords relevant to your brand and set up searches to pull mentions in to your chosen dashboard; these could be your brand name, your products or services, your competitors or fields in which you're a thought leader.

Stones, pebbles, sand

It's clear that in the world's biggest conversation, some content is going to require an immediate response while others will require no response at all. Categorise content into three tiers (use the stones-pebbles-sand analogy) and decide on the opportunities you'll use for engagement (see Table 4).

Table 4 - Categorising Conversations and Actions

Category	Action	Examples
Tier 1 (stones)	Requires an immediate response	Time-bound customer service enquiry
Tier 2 (pebbles)	Requires a response, although not urgent	Compliments of product/service
Tier 3 (sand)	Requires no response	Generic neutral mention

Set clear guidelines on the conversations your team should engage in e.g. negative brand mentions; peer-to-peer conversations, and be consistent in your responses.

Recording

Keeping a trackable workflow record is essential for analysing, reporting and informing future engagement strategy. The 24 hour nature of social conversations means that its inevitable that different members of the team will be charge of monitoring at different times; therefore a record of conversations can ensure content doesn't slip through the net. Some commercial tools include the ability to create an automatic 'audit trail' as built-in functionality, but key information to capture could include:

- Who is posting?
- What are they saying?
- Where are they saying it?
- What is the sentiment of their post?
- What is the share of voice?
- Is it a time sensitive post?
- Does the post need a response?
- Has the post been responded to?
- Has the user responded?
- Does another part of the organisation need to be contacted prior to response?
- Does the post need to be escalated to a senior executive?
- What is the status of the conversation?

Reporting

Your workflow record can then be shared with the wider organisation on a weekly and monthly basis, pulling out and evaluating metrics like share of voice and sentiment across the culmination of conversations. Analysis should then inform future engagement strategy.

Flexibility

While this may all sound quite prescriptive, it's simply a framework to enable you to make the most of the engagement opportunities offered by social media. Despite this, the key with social media is to be flexible any situations that may get thrown up. Adapt and engage!

APPENDIX

The following is a more comprehensive list of social media monitoring tools available.

Those marked with an asterisk (*) are reviewed in **Chapter 5** of this document:

Paid For Tools

[Alterian SM2*](#)
[Asomo](#)
[Attensity 360](#)
[Attentio](#)
[BrandWatch*](#)
[Buzz Capture](#)
[Buzz Logic/Twelvefold](#)
[Media](#)
[Collective Intellect](#)
[Crimson Hexagon](#)
[Cymfony*](#)
[Dialogix](#)
[Ecairn](#)
[Jive Software](#)
[Lithium SMM \(Scout\)](#)
[Meltwater Buzz*](#)
[NM Incite](#)
[Overtone](#)
[Precise's MP+ Social](#)
[Radian 6*](#)
[Revinat](#)
[Spiral 16](#)
[Spredfast](#)
[Synthesio](#)
[SAS](#)
[Silverbakk](#)
[Sysomos*](#)
[Trackur](#)
[Trendrr](#)
[Ubervu](#)
[Viralheat](#)
[Visible Technologies](#)
[WebTrends](#)

Free Tools

[BackTweets](#)
[Brand Monitor](#)
[Google Alerts](#)
[Influitive](#)
[Netvibes](#)
[SocialMention](#)
[Social Pointer](#)

CONTRIBUTORS

This guide has been produced by members of the CIPR's Social Media Advisory Panel as a collaborative project, co-ordinated by Simon Collister. Full profiles of the contributors are below:

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Simon Collister is a senior lecturer at London College of Communication, University of the Arts, London. He is currently conducting PhD research at Royal Holloway, University of London's New Political Communication Unit on the mediation of power in networked communication environments. Before entering academia, Simon worked for a number of global communications consultancies, planning and implementing research-led digital campaigns for a range of public, voluntary, and private sector organisations. He tweets at @simoncollister and blogs at www.simoncollister.com

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Dr Mark Pack works on digital projects for Blue Rubicon, winner of both PR Week and CIPR agency of the year, and is a Visiting Lecturer in Journalism at City University. He is also co-author of 101 Ways To Win An Election and a member of the CIPR's Social Media Panel. He is to be found online at www.MarkPack.org.uk / @markpack.

Michelle Goodall MCIPR

Michelle specialises in digital communications and social media. Formerly Digital Director at Lexis Public Relations she has 15 years' online communications and social media consultancy experience. During this time she has developed social media engagement strategies, enabled social business transformation and managed communication/crisis management projects.

Michelle's clients, past and present span many industries and include Random House, RSPCA, Aviva, Coca Cola, Domino's, eBay, Camelot, Random House, Macmillan, Penguin, Diageo, Boots, Manhattan Loft Corporation and McCarthy & Stone. She worked with

London2012's digital, editorial and communications teams over a 4-year period and was a part of the award-winning social media/communications team during the games itself.

Michelle is a CIPR Social Media Panel member, social media trainer for Econsultancy/visiting lecturer at Manchester Metropolitan University and a regular speaker. She can be found at [linkedin.com/in/michellegoodall](https://www.linkedin.com/in/michellegoodall) on LinkedIn and @greenwellys on Twitter.

Dan Tyte MCIPR

Dan worked in communications B.F. (Before Facebook) and has run campaigns for clients ranging from professional sports teams, pop musicians and alcoholic drinks using on and off-line tools. An executive director at Working Word, member of the Social Media Panel and committee member of CIPR Cymru, Dan's debut novel, *Half Plus Seven*, set in a PR and digital agency, will be published in Spring 2014 by Parthian Books.

Robin Wilson MCIPR

Robin is social media and PR director, McCann Manchester and has worked in PR and social media for over 20 years, running campaigns for brands such as Aldi, Apple, Casio, Facebook, Holiday Inn, Motorola, MTV, Peugeot, Symantec, Tiger Beer, Tsingtao Beer and Yahoo. He was lucky enough to launch the iPhone in the UK, head up Facebook's agency team, launch Durex Play O, which won several award including CIPR Best Digital Campaign, and introduce Yahoo Answers to the UK. Robin has co authored two books on social media, sits on the UK's social media steering committee, regularly speaks at conferences and lecturers at universities on social media.

Rob Brown FCIPR

Rob is Managing Partner at Rule 5 a PR and digital agency in MediaCityUK Manchester with clients in food, sport, finance and the media. Rule 5 was named outstanding newcomer in the Prolific North Awards six months after it launched in November 2012. Rob was previously UK MD of Staniforth, part of the TBWA group.

He is listed in the PR Week Powerbook 2008-2012 and was named the 4th most respected individual working in PR in the UK in an industry survey in New Media Age's 'Reputation Online' in 2011. He was awarded North West's Outstanding PR Practitioner by the Chartered Institute of Public Relations (CIPR) in 2008 and for Outstanding Contribution to Social Media in the national SomeComms Awards in 2011. He was awarded the Stephen Tallents Medal by the CIPR in 2013.

Author of Public Relations and the Social Web (Kogan Page, 2009), he blogs for The Huffington Post and has written chapters for 'Public Relations Cases: International Perspectives' (2010) 'Public Relations: A Managerial Perspective' (2011) and 'Share This' (Wiley, 2012). He is joint editor of the soon to be published 'Share This Too' (Wiley, 2013).

He was founding chair of the CIPR social media panel.

Dom Burch MCIPR

A father of two and keen football fan, Dom grew up in Reading but attended Leeds Metropolitan University graduating with a BA Honours degree in Public Relations. Following a short stint as a summer intern with Saatchi & Saatchi's Cause Connection unit in London, he then joined Green Flag Motoring Assistance in Leeds in September 1998 as a PR executive.

After two years with Green Flag, Dom was promoted within the Royal Bank of Scotland Group and moved south to join Direct Line as PR Manager for Motor. He had specific PR responsibility for its motor insurance and breakdown assistance portfolio, but also led the insurer's road safety campaigning. As a result Dom and his team helped change the law making it an offence to drive while using a hand-held mobile phone.

He returned up north in 2002, joining Asda initially as PR manager for food, but later was promoted to head of corporate PR in 2008, and head of PR in 2012. In his current role as head of social media Dom is responsible for Walmart's social media strategy in the UK.

Dom has been a member of the CIPR's social media panel since its inception, and is an external advisor for Leeds Metropolitan University's Corporate Communications Masters Degree course. He also volunteers for Bradford Community Broadcasting (BCB 106.6FM) and co-hosts Drive on alternate Friday afternoons.

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