KDPaine's Checklist for Monitoring Services:
Issues to consider, choices to be made & questions to be answered before you begin a measurement project.

(This assumes that you have already selected content analysis as your measurement methodology.)

Since the number of measurement and monitoring vendors is growing in direct proportion to the size of the social media space -- i.e. there's one new measurement tool announced for every 1 million Tweets or Facebook posts published -- I'm not going to bother trying to match capabilities and options to any specific vendors. What I WILL try to do is outline some of the decisions any new customer for one of these tools will need to answer.

Daily Alerts set up:

These are the ubiquitous alerts that arrive on you Blackberry or iPhone by a certain time each morning that are either a total vomitus stream of partially relevant data or a carefully screened, limited report of what people are saying about your brand today. Before you begin a daily alert feed, you will need to answer these questions.

Question 1: Search the universe? ___ Search key publications only? ____

This question requires that you state a preference for what might called a full body cavity search or just a mild pat down. (Sorry, it IS national opt-out day.) In other words, do you want to see everything from everywhere, or just a limited stream of news from key sources?

Question 2: What search terms are you looking for? Your company name ____ your brand ____ competitors brands _____

In the industry these terms are commonly referred to as search strings, and you will need to put together a list of relevant search terms before any monitoring can begin. But even before you get into the specifics of the terminology by which people might be referring to you (and don't forget acronyms, abbreviations, ticker symbols and slang.) you need to decide how big a universe you want to search. We typically recommend searching for whatever your customers and your marketplace considers interesting and relevant to your business.

Question 3: By what time do you need your alert delivered? _____ am EST _____ pm EST

Most news services can deliver the prior day's report by 9 am. Some are as late as 10 am. If you need an alert delivered sooner, be prepared to miss some items that appear very early in the morning on the US East Coast or very late in the day in Europe.

Question 4: What format do you want your alert to take? PDF ____ Word ____ Blog ___ HTML____Text____

Most monitoring tools will send an email out to whomever you specify. Agencies (and KDPaine & Partners) use private blogs so that anyone whom you have authorized can access it from any device.

Question 5: Vomitus river of data? _____ or human selected and screened _____

Given that some brands are receiving many thousands of posts a day, you almost always will need some level of screening, this can be done badly by machines, or much better by humans who understand your goals and priorities.

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Monitoring system set up:

Some of the more mundane parts of putting brand or corporate monitoring in place will already have been answered if you opt for Daily Alerts – the search string and competitors for example will have already been defined. However there are still some additional questions you will need to answer.

Question 1: Is one news source sufficient ___   I need to make sure I get EVERYTHING ____

In reality, even Google doesn't get everything, as I so embarrassingly discovered recently. We routinely set up Google Alerts for all of our clients to supplement and check the completeness of other feeds such as Factiva, Twitter search, Boardreader, Nexis, MyMediaQ etc. We figure that between ALL of those sources we should be getting 100%.   NOT! For one client, who announced a very major development partnership in September, everyone -- Google, Factiva and the AP web site all missed it. Now we could blame that on bad SEO or something else, but when it comes right down to it, blame won't explain that gap in your date. You need to set expectations and decide just how comprehensive your search needs to be.

Question 2: I'm going to monitor _____ (number of) competitive companies

Depending on the size of the competitor, its market share, and its projected growth rate, you can assume that you will spend as much to measure a competitor as you do measuring yourself. Sure, a lot of mentions will contain two or more brands, but in general, the overlap isn't more than about 20% so for budgeting purposes, if you are spending $20,000 a year on your own monitoring budget $40,000 for two competitors, $60,000 for three, and you should be fine.

Question 3: I want all my data available every day ____ once a week _____ once a month

Most media channels and monitoring companies do not actually deliver data in real time. We find anywhere from a 24-hour to 2 week lag for some services. If real-time data delivery is important, make sure you get it writing from your provider.

Measurement set up:

Given the torrent of Tweets and other social mentions that must be part of any measurement system in today's media environment the first question you need to ask is:

Question 1: Do I get sufficient volume to warrant automated coding Yes ___ _ No ____

Computers do a really good job of putting words into buckets. In most cases (unless you are Visa or Sun or GE or SAS or have some other unfortunately ubiquitous brand name) computers can go thru the torrent and pull out mentions of your brand and put them into a database complete with the date of the mention, the source, the author and the title. If it's really good system, it can accurately determine if you are the focal point of the story, if your thought leaders are quoted, and what the primary subject of the article or post is.

At KDPaine & Partners this is generally the extent to which we are comfortable relying on computer-aided analysis. Beyond that, for analysis of sentiment, messaging, positioning etc. we rely on humans. The most sophisticated computer aided systems, like SAS and Cymfony, can be "taught" key messages, specific definitions of positive or negative, and some general concepts. However, it takes time and testing to set up such a system. So chances are if you are getting fewer than 1500 mentions a month, it's probably cheaper and more efficient to use humans. They learn faster, can adapt to changes more rapidly and get the sense of a story, without explicit mentions of key words. So if you want your qualitative metrics done right, use a human.

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Question 2: Do I need to random sample? Yes -___ No _____

For brands that receive more than 1500 mentions a month, you can trust what an automated system to get sentiment and subjects right about 60% of the time. If you are comfortable with those odds, use a human. If not, you may need to select a random sample of all mentions for a human(s) to code.

Question 3: Do I random sample by channel _____ or by date _____

We recommend random sampling at least 10% of each channel of news that your receive. So 10% of Twitter, 10% of Facebook, 10% of YouTube. Alternatively, you can random sample everything that comes in every week or every month, depending on the client. The problem with both of these approaches is that you don't get your results until the end of whatever period you are sampling.

Question 4: How will you define positive? 4-point scale ___ 6-point scale_____

Our standard categories of sentiment are: Positive (leaves the reader more likely to do business with the company, Negative (leaves the reader less likely to do business with the company, Neutral (contains no sentiment at all) Balanced (contains equal levels of positive and negative comments.

Some clients, however, prefer a more nuanced scale which would include Very positive, somewhat positive, neutral, somewhat negative, very negative and balanced.

Question 5: Do you have messages to convey to your publics? Yes _____ No _____

Key messages are the daily bread and water of most communications departments and even in the uncontrolled environment of social media you will want to track them. We apply the following scale:

5 = Amplified key messages

4 = Contains key message

3=Contains part of a key message

2=Contains no key message

0=Contains the opposite of your key message or a negative message.

Question 6: Do you care how you are positioned in the conversation? Yes ___ No ____

Frequently, whether you planned it or not, the social media conversation is likely to position you favorably or unfavorably on a number of key issues such as sustainability, social responsibility, leadership etc. Positioning in similar to messaging, but not specific to your brand. You can apply positioning statements to your own brand or just as effectively to any of your competitors.

Question 7: Are different audiences more than some others? Yes ___ No _____

If the answer is yes, you will need to specify which audiences are more or less important and how you define each audience.

Question 8: Is the visibility of your coverage important? Yes ___ No ____

Studies have shown that the more visible your brand is, the more likely people will be to remember it and the same goes for your messages. So you need to define what visibility means. At KDPaine & Partners we define it as "mentioning your brand in a headline or the top 20% of an article. Another factor is what we call dominance. Dominance is defined as the extent to which a story, mention, threads or Tweet is about your brand or mentions other brands. We define three categories for Dominance:

- All about you

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- Mostly about you but mentions other brands
- Only mentions you in passing.

Question 9: Is there anything else you need tracked? Yes ___ No ____

If you have initiatives, analysts, key battles, programs or anything else that you are spending an exceptionable about of time on in the next six to twelve months, now would be the time to bring it up to ensure that any references to it are captured.

Question 10: Do you need to know if a link back to your website or blog is included in the story?

These days, links are key to tracking marketing effectiveness, so if it is important to know if a link has appeared, you need to account for that in your report.

Reporting set up

To be honest, most communicators only pay attention to their measurement programs when the results are reported .We get that, the details are mundane and frequently tedious to work out. But to get your reports right, requires just as much attention to detail. With the widespread use of interactive dashboards, you can pretty much dream up your very own, totally personalized reporting mechanism. In order to make the right choice, you need to answer some pretty fundamental questions like:

Question 1: Style: I want to create my own reports ___ I want someone else to prepare them for me ____

Many organizations today expect their PR agencies to prepare their monthly reports complete with insights, advice and recommendations. Others would rather leave it to a third party firm like KDPaine & Partners who can take a totally unbiased approach to analyzing the data. Still others prefer the DIY approach and want to go to a desktop application themselves and pull down the data and analyze it. How you answer this question will have a large bearing on what solution you chose. Most monitoring companies are essentially software providers and do not have the expertise to analyze and interpret the data in a way that is relevant to your specific goals. Market research firms like KDPaine & Partners

Question 2: I want to see results reported in: ___PowerPoint ___ HTML/Online ___Blog ___ Word ___ Excel ___ Other ____

The real question is, are you comfortable with reporting online with links, or cutting and copying data from your dashboard into PowerPoint?

Question 3: I want to receive reports weekly____monthly -- every 6 months ___ annually

Not only do you need to decide frequency but you need to plan delivery backwards from when you need to make decisions. If you do you're budgeting and planning in January you need to have fresh and current data available in December, which means that your annual report will include data from October 2009-October 2010. Ideally you will look at data over a thirteen month cycle to make sure you account for any seasonality in the results.

Question 4: I prefer trend charts____ period charts____ both _____

When you are reporting Q1 results, you will obviously need to show the results from that period/ But you should also compare and contrast those numbers with prior periods.

Question 5: I prefer reporting results on a week to week ____ month to month_____ or quarter to quarter_____.

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There are plusses and minuses for both approaches. Quarterly results show big trends, monthly or weekly reporting enables you to pinpoint specific activities and correlate those activities to results. Monthly enables you to point to a specific program that took place in a month and see the results. Weekly or daily reporting is best when correlating to web traffic, and web analytic data.

Question 6: I need to report on specific KPIs: Yes ___ No ___

If you have established Key Performance Indicators for your department and need to report on them regularly, you need to let your vendors know so they can program that number into the dashboard, or at the very least provide it on a regular basis. If you need help defining your KPIs, checkout our KPI development service here:

Question 7: I need a Top Ten List for: Reporters _____   Publications _____ Bloggers _____ Stories/headlines_____ Popular links _____

It is frequently useful to see a top ten list of reporters, authors, stories or publications that can easily be referred back to. We recommend no more than 10, but some clients prefer a top 100 list.

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