

Online Engagement and How to Measure It

This is an excerpt from *Measure What Matters*, the new book from Katie Delahaye Paine available March 15, 2011 from Wiley Press.

Like most other buzzwords, “engagement” has come a long way from its original meaning of “an agreement to marry.” Essentially, it started with the notion that a website or a blog was “engaging” enough to get a reader to begin to develop a relationship with the brand. People began to speak of measuring engagement. Not just how “sticky” the site was, but the extent to which it enhances the relationship between the user and the brand.

Communications professionals and marketers now want to measure a site’s ability to create an experience that earns a visitor’s loyalty and, with luck, its business. As a result, “engagement” now means everything from the number of times that a visitor returns to a site, to the number of comments on a corporate blog, to the number of retweets of a Twitter stream.

Engagement is critical for three reasons:

1. Engagement is the first step in building a relationship between your customers and your brand. And in this era of drive-by flaming and inundation of data and messages, an organization’s relationships are what will differentiate it from everyone else. Engagement is a way to determine whether you are having a dialog, or you are just yelling ever more loudly.

2. Customer engagement helps promote and protect your brand. Engagement produces *brand advocates*, the proverbial “people like me” (PLMs), that these days have much more influence and credibility than corporations. These are the folks that broadcast their enthusiasm for your brand to their friends. Years ago, my company’s work with P&G and GM determined that these people were the single greatest influence on sales. And when it comes to defending yourself against negative comments in the blogosphere, you can never have enough staff on hand. Besides, your own spokespersons will never be as credible as those PLMs.

3. *Customer engagement can make your products better.* Listening to those customers that are most actively using your products provides a virtual “customer panel” that can identify weaknesses and areas for improvement in your products or services.

If I’m managing communications for a non-profit and my ultimate goal is to increase donations, I know that somehow I need to form relationships with potential donors. The stronger my relationships with donors, the more likely they will be to donate to my organization. And engagement is one way to measure the strength of those relationships.

It is therefore critical to understand the extent to which people are engaged with your products, company or organization. The good news is that measuring engagement in social media is relatively straightforward. Here’s how it works.

In reality, engagement comes in a variety of levels and intensities, including:

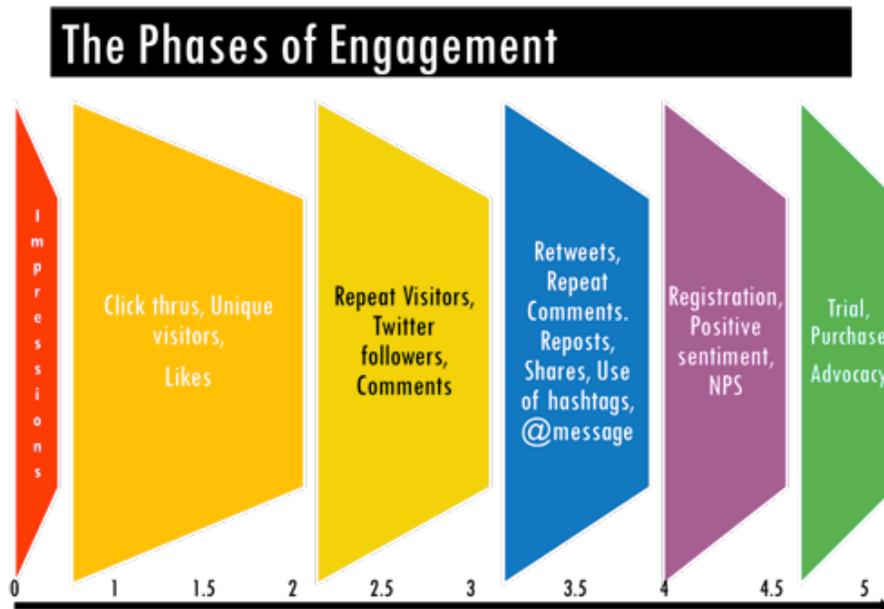
- Level 1: *Lurking*
- Level 2: *Casual*
- Level 3: *Active*
- Level 4: *Committed*
- Level 5: *Loyalist*

So, for example, let’s consider a typical non-profit organization with a typical potential donor/stakeholder. Let’s call her “Veronica,” and let’s call the non-profit “KDP.” KDP’s relationship with Veronica starts when she visits a website, meets a volunteer on the sidewalk, gets a direct mail solicitation, sees an interesting Tweet, or a friend suggests she become a fan on Facebook. All those points of contact are potential points of engagement.

However, reaching Veronica’s “eyeballs” is just an opportunity, it’s not yet engagement. If Veronica is a website visitor or someone who has seen one of your Tweets or YouTube videos but takes no further action, we call her a *lurker*.

Essentially, you really can’t differentiate a human lurker from an Internet crawler or some other automated engine, so the engagement level is zero. See Figure 5.2.

Figure 5.2: The Phases of Engagement



Level 1 Engagement: Lurking

If, however, Veronica sees something she likes and decides to “like” it on Facebook, or bookmarks the webpage, then a relationship has begun to form. This is the first level of engagement. At this point the relationship is pretty much pure exchange, to use the Grunig definition we introduced in Chapter 4. In an exchange relationship, one party gives benefits to the other only because the other has provided benefits in the past or is expected to do so in the future. In other words, it’s just barely a relationship, with no loyalty involved, but some sort of relationship has formed.

Level 2 Engagement: Casual

True engagement really only begins when Veronica takes some sort of action that indicates a desire to have further contact. It may be subscribing to a blog, following someone on Twitter, downloading a YouTube video, or suggesting a page to a friend on Facebook. I call these actions Level 2 engagement.

At some point, some percentage of these partially engaged fans or followers or friends will either get bored or become just passive observers and the relationship stagnates. When it comes to measurement, the key metric at this point is one that will determine if the relationships are progressing. Therefore, you'll need to examine the ratio between new and repeat visitors, and between those that come once and those that return more than three-to-five times a month. Twitter, YouTube, and Facebook all provide statistics that you can use to measure engagement at this level.

So, let's suppose that Veronica now decides to follow KDP on Twitter (implying permission to have further conversation) and, as a result, she sees content that she wants and enters herself in a contest. Both KDP and Veronica benefit, but there's no further expectation involved. Nonetheless, that action is a step up from no action at all; it's more than just lurking on a website. Therefore, to KDP or to Procter & Gamble or any organization participating in social media, it may indicate that someone has moved a step closer to a donation or sale.

Unfortunately, Level 2 engagement is where most relationships end. The vast majority of fans, friends, and followers never go past that initial point. That's okay, all you care about are the ones that care about what you have to sell. So our second engagement metric should be the ratio of eyeballs to people moving to the first or second level of engagement.

Level 3 Engagement: Active

Now let's assume that Veronica hasn't gotten bored, and is seriously interested in KDP's content. She has found friends with similar interest on the KDP Facebook page, is actively participating in Facebook or blog threads, is retweeting news updates from KDP, and sending out YouTube videos to all her friends. She's using KDP Twitter hashtags, perhaps messaging KDP directly, and is convincing her friends to do the same. She is now at Level 3 Engagement.

Now the relationship is more of a communal one. As we saw in Chapter 4, in a

communal relationship, both parties provide benefits to the other because they are concerned for the welfare of the other, even when they get nothing in return. For most public relations activities, developing communal relationships with key constituencies is much more important to achieve than developing exchange relationships. Because when your relationships with your stakeholders are communal you will be forgiven for mistakes, you will get past a crisis faster, people will pay more for the product, and they'll recommend it to their friends.

So for Level 3, your key metric is the increase in Level 3 engagement over time, which you can determine by the analytics that most sites provide, e.g., number of comments, number of retweets or @messages on Twitter, or number of repeat visitors.

What you really want to know is: What are you doing or writing or posting that has convinced all those lurkers and Level 1 and 2 folks to go to the next step? What is convincing them to care more about you or your organization or your cause? You need to examine your activities, post-by-post and tweet-by-tweet, to see what is increasing the engagement level and bringing that stakeholder into a communal relationship.

Level 4 Engagement: Committed

If Veronica gets enough satisfaction from the relationship and her interactions thus far, she might be ready to move to Stage 4 engagement: Registration on KDP's site or taking action on KDP's behalf. Somehow, from all that Veronica has learned so far about KDP, she trusts the relationship enough to provide her identity in the form of her email address for registration or membership. What this means from a relationship standpoint is that the components of satisfaction and trust have been added to the relationship. According to Grunig, *satisfaction* is the extent to which each party feels favorably toward the other because positive expectations about the relationship are reinforced. A satisfying relationship is one in which the benefits outweigh the costs.

So your key metric for Level 4 engagement is the number of new registrations. What you should be measuring is the increase over time, not just the raw numbers.

Level 5 Engagement: Loyalist

But engagement doesn't end there; ultimately, the goal is donations or volunteering. So to measure this, the fifth and final level of engagement, you need to look at Veronica's loyalty to the cause. How often does she contribute or volunteer? Is she bringing other volunteers with her, and is she expressing her commitment to the relationship to her friends?

While you can track Veronica's comments through Social Mention, Google News, or any number of monitoring tools, web analytics can't provide all the answers. Ultimately, KDP will want to survey all the Veronicas out there and really find out how they're feeling about the organization. This is where the Grunig Relationship Survey comes in. Ideally the survey would be administered prior to starting a social media campaign and then six months into it to see how you're doing on each score.

So is there one simple way to measure engagement? No, there are lots, and my Levels system above is just one of them. But if you use this technique, you'll know a lot more than just "Are they engaged?" You'll know what is increasing engagement, what is turning people off, and how likely are they to act on your behalf.

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Katie Paine's new book Measure What Matters will be available March 15th, 2011 from Wiley Press, and can be preordered now at Amazon.com, Borders, and Barnes & Noble.

