

KD PAINE'S NEW SOCIAL MEDIA MEASUREMENT CHECKLIST

Updated March 2012

KDPaine & Partners

1. Define your measures of success, KPIs and Dashboard

_____ Make a list of who influences your budget and sets your priorities.

_____ Set up a meeting of all those people to define your measures of success.

_____ Set the agenda for the meeting, including:

1. A definition of all key stakeholders;
2. Prioritizing those audiences;
3. Definition of measurable and tangible goals;
4. Defining what/who you will be benchmarking your results against; and
5. Define the Key Performance Indicators that they want to see.

_____ Summarize the meeting in a document that includes the Key Performance Indicators that you will be reporting on and the Dashboard of charts or table that you will need to show to present your results.

_____ Get sign-off on those KPIs and the Dashboard.

_____ Based on the KPIs, make a list of the data you will need to report on those KPIs.

2. Select a listening/monitoring tool

(See also KDPaine's Monitoring Vendor Selection Checklist)

_____ Make a list of the search terms you need, including companies, benchmarks, subjects, topics, issues or peer institutions you need to know about.

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_____ Decide if your program is domestic, international, or some combination.

_____ Make a list of the channels you need to monitor:

○ **Traditional media**

Network TV: Do you need actual tapes or will transcripts do?

Cable TV: Do you need actual tapes or will transcripts do?

Radio: Do you need actual tapes or will transcripts do?

Newspapers

Magazines

Trade publications

Analyst Reports

○ **Online Media**

Online versions of traditional media

Online-only publications

○ **Social Media**

Institutional Blogs (ones that originate within your organization)

External Blogs

Pinterest

Quora

Consumer review sites such as Amazon, TripAdvisor, Yelp

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- Google +
- YouTube
- Flickr
- Twitter
- Facebook
- MySpace
- Linked In
- Social Bookmarking Sites (Digg, Delicious)
- Virtual reality sites (Second Life)
- List Serves
- Forums

_____ Make a list of the quantitative data you will need:

- Number of mentions
- Number of comments
- Length of Facebook thread
- Number of YouTube or Flickr views or comments or votes
- Number of Twitter followers
- Opportunities to see (OTS), a.k.a., impressions
- Google Rank

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- Other rankings
- Twitter authority
- Technorati authority
- Industry authority

_____ Make a list of the qualitative data you will need:

- Tonality – positive, neutral, balanced or negative
- Spokesperson quote
- Affiliation of Spokesperson
- Messages content: amplified, full, partial, incorrect, negative, or none
- Individual messages communicated
- Issues discussed
- Subjects mentioned
- Lines of business mentioned
- Dominance of mention
- Prominence of mention
- Recommendations/reviews
- Brand benefits mentioned
- Accuracy of mention

_____ Estimate volume of mentions using Google News or Technorati.

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_____ Decide if you need an automated system, random sampling, or manual review.

_____ Decide whether you will do this work in-house or will need a measurement partner.

_____ Create an RFP that allows you to accurately compare vendors (apples to apples). Include your best guess as to the volume of mentions and a full list of what you need to track.

3. Select a web analytic and/or CRM tool

_____ Create one or more unique URLs and landing pages so you can directly tie activities to results.

_____ Make a list of the engagement data you will need:

- Unique visitors
- Repeat visitors
- Length of time on site
- Click-throughs
- Registrations
- Conversions

_____ Make a list of the membership/conversion data you will need:

- Number of registrations
- Number of new donors
- Number of repeat donors

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- Number of conversions
- Market share
- Value of member
- Cost of social media program

_____ Talk to whoever within your organization manages the website and collects web data determine what data is missing.

_____ Decide if you need any additional tools.

_____ Create an RFP for web data collection and analysis.

4. Select a survey tool

_____ Make a list of audiences you need to survey.

_____ Determine if there is a list available in-house, or if you need to purchase a list.

_____ Make a list of any perception data you will need:

- Awareness
- Perception
- Preference
- Consideration
- Trust level
- Commitment level
- Satisfaction level

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Exchange/Communal relationship level

Control mutuality level

_____ Draft a list of questions to which you need answers.

_____ Identify a professional expert, academic, or internal or external partner to create and test your survey instrument.

_____ Provide your list of questions to the expert.

_____ Review the proposed instrument.

_____ Test the proposed instruments.

_____ Field the survey.

_____ Review the cross tabs to make sure you have the data you need.

_____ Analyze the result and draw conclusions.

5. Analyze & report results

_____ Put all relevant data into a KPI table.

_____ Look for significant failures: Where did a program not deliver?

_____ Look for exceptional successes.

_____ Drill down into the data to determine cause and effect.

_____ Pull most relevant charts and data into a PowerPoint presentation.

_____ Report results and make recommendations.

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Miscellaneous Notes:

