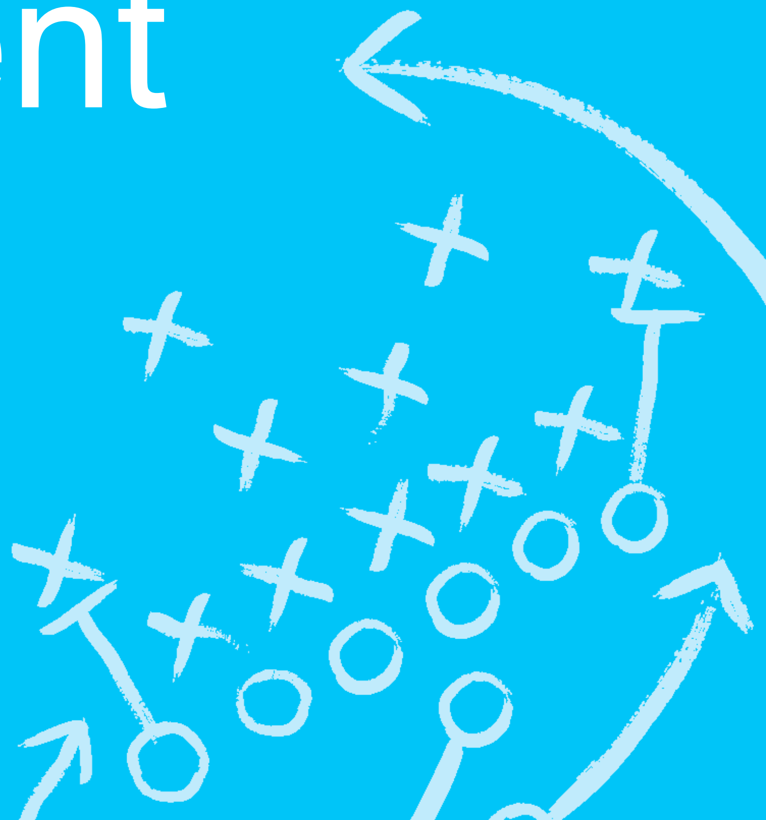
Radian6

Monitoring and Engagement Playbook



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Intro: Social Media, the Radian6 Way

The soul of engagement is quite simple: Connect with people to build relationships that are mutually beneficial and emotionally fulfilling. That's not a hard concept to grasp; in fact, it's in our very nature to do this, as social beings. But when you put engagement in the context of the social web, then tack business use onto the end, quite a few questions and concerns pop up that can make the thought of engagement on a company-wide – or even department-wide – scale overwhelming at best.

In today's world, though, online engagement can't be ignored or brushed under the rug. It needs to be welcomed with open arms, but not without caution – it's okay to put a microscope to engagement. In fact, it's necessary. Engagement is very much a personal thing, and that means personal to your organization, too.

Intro: Social Media, the Radian6 Way

In the business world, making sense of online engagement needs to include discussions around employee engagement policies and guidelines, the establishing of process around engagement that make it scalable throughout your organization, and, most importantly, and the framing up of what engagement actually means in the context of your business.

This playbook is part of our own engagement strategy and is tailored specifically to Radian6 internal processes that include the use of our dashboard and Engagement Console. We wanted to share this with you to a.) get you thinking about how your own engagement process might come together, and b.) help you understand the real nuances of company engagement on a very granular level.

Before we let you dig in, though, it's important we lay out some additional context and caveats for this playbook:

- As stated above, our internal process, and thus our playbook, leans heavily on the use of our own tools, and is tailored to make sure we're meeting our own goals and objectives for social media engagement. Your goals and monitoring tools might differ, and that needs to be taken into consideration when planning your own engagement strategy. To that end, take this playbook as an example and inspiration for your own plans. We'll be generalizing some of the playbook content on our blog throughout the next month, to offer up a different, perhaps easier perspective for our community to think on.

Intro: Social Media, the Radian6 Way

- A good chunk of our monitoring strategy is focused on Twitter, because of the real-time, fast-paced nature of the platform. We do, however, have processes for fielding, assessing, and responding to blog and forum posts and other media types, and we'll be sharing those processes with you on our blog, as well.

Do keep these couple things in mind as you move through this playbook, and please make sure you reach out to us with any questions or comments, either on our upcoming blog posts or by emailing us at community@radian6.com. So, without further ado – take a look and see how we manage our engagement.

Objectives

Alert your company of issues as they occur, with sufficient detail to quickly identify how to respond.

Understand the amount and nature of conversation surrounding your company in the digital communications space.

Report and track metrics over time to measure the impact of your company's reputation and engagement in social media.

Understand the Competitive Landscape

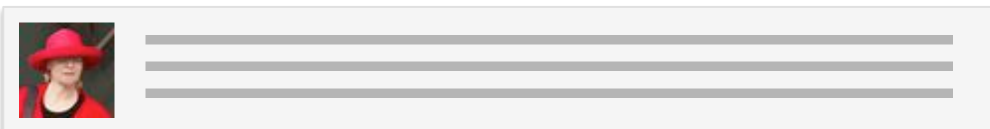
Topic Profile Settings and Details

In your topic profile configuration screen, select the languages you want to monitor and all media types to cover as much feedback as possible.

Topic Profile name	Purpose
Your TP Name	To track online mentions of your company with associated spellings
Your Company Alerts	To track online mentions of keywords you want to be alerted about regularly.
Competitive Reporting	To track online mentions of competitors with associated spellings.

Your company will monitor online conversations surrounding your brand to determine if engagement/response is required.

On topic post is found



Operator reviews the content to answer the following questions:

- What product are they discussing?
- What is the theme of the conversation?
- Can they be added to our CRM system as a contact/lead?
- What is the source, and is it considered influential?
- What is the general sentiment/tone?

Engagement Stage Options

- New Content Not reviewed – Default when an on topic post is found
- Reviewed, Determining Best Response – Qualified post, assigned to appropriate employee for possible response
- Recommend Follow up – To be managed by assignee
- Commented, Awaiting Reply – To be managed by assignee
- Commented Closed -- To be managed by assignee
- Referred – To be managed by assignee
- Resolved, no further action required – To be managed by assignee
- Reviewed, Closed, no response needed – To be managed by assignee

Priority Options

Rating	Definition
No Priority Specified	Standard on-topic post, default setting
Low	Interesting blog/forum post, general comments
Medium	On-topic post about competitor's business/complaints/ compliments
High	Potentially damaging, crisis

Classifications – Assignee to code appropriately

Classifications are selected by assignee/traffic coordinator to track the nature of online conversations

Classification	Definition
Product Review	Product feedback/review, including RT's
Gen. Product/ Company	Passing mention
Industry Discussion	Industry conversations, including competitive references
Company Events	Conferences & webinars

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Workflow

Classifications – Assignee to code appropriately PART 2

Classification	Definition
Product Review	Product feedback/review, including RT's
Gen. Product/ Company	Passing mention
Industry Discussion	Industry conversations, including competitive references
Company Outreach	Mentions by an employee/partner
Support/ Troubleshooting	Existing customer support/troubleshooting inquiry
Recommendation/Ref	Positive reference to using your product or service
Sales Lead	Possible/potential lead
Partner/Reseller	Mention by a partner/resellers customer

Notes & Tags – What are they?

Type	Definition
Notes	To enter interactions with the customer/contact
Post Tags	Used to provide a summary of the content
Source Tag	Used in Radian6 to track a source when discussing on topic content

Post Tag Examples

Post Tags	Definition
#brandbowl2010	To track online company events
blogwell2010	To track conferences and events
solvisconsulting (partner/resellers name)	To be used to track a mention regarding a partner/ reseller

** All post tags should follow the lower case format

** Any new conferences/events should follow the format of <eventnameyear>, i.e. blogwell2010

** Any new online (twitter) or interactive events will begin with a # , i.e. #mtv2009 #brandbowl2010

Source Tags Examples

Source Tags	References / Definitions
companyemployee	To identify an employee or employee of a partner/reseller
businessline1customer	To identify a customer of one individual line of your business
businessline2customer	To identify a customer of a different business line
saleslead	Possible customer in communication with Sales
prospect	To identify a new contact you’ve never talked to before
Influential Twitter Names (i.e. @chrisbrogan)	To identify a person as an influencer
twitteraccountname	To identify tweets from your company’s Twitter account

Macros in the Engagement Console

Macro Name	Settings
Company Content	Engagement Level: Reviewed, closed, no engagement required Classification Level: Company Content
Content from Your Employees	Engagement Level: Reviewed, closed, no engagement required Classification Level: Company Outreach Priority Level: Green Flag (Low)
Webinars	Engagement Level: Reviewed, closed, no engagement required Classification Level: Company Event Sentiment: Positive Priority: Green Flag (Low) Post Tag: webinar
Company Event	Engagement Level: Reviewed, closed, no engagement required Classification Level: Other
Quick Close (one for General and one for Spam)	Engagement Level: Reviewed, closed, no engagement required Classification: Other Post Tags: general or spam

Escalation

Alert appropriate internal contacts of escalated/critical issues as they occur with sufficient detail to quickly identify whether to respond.

Severity	Immediate (1 day)	7 Days Issue Trend
High	Influential Blog, negative tone	10+ med-hot temp posts/comments on a high authority site
	Post going viral via social networks, med or hot temp	10+ unique users have the issue
	A med or high temp customer post that draws media attention	
Medium	Influencer or high visibility forum post, med or hot temp	5+ or more med-hot temp posts/comments on a high authority site
	Post that compels 3+ other commenters to share their negative customer experience	6-9 unique users have the issue
Low	Low influencer, hot temp with 12+ comments, or 5+ unique comments	5 unique users have the issue

Post Assignments

List of sample post assignments provided below. These should be updated for your company as appropriate

User – email address	Topic	Common Classification
Customer Service/ Support	Customer Support, Technical Support, Troubleshooting	Support/Troubleshooting
Product Management Team	Enhancement recommendation	Product Review
Lead Gen Team	Expressed need for a demo/to buy	Sales Lead
Director of Community	Community and overarching industry conversations	Industry Discussion, Company Content
Corporate Community Managers	Corporate and brand communities, niche industry conversations	Industry Discussion, Company Content

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Post Assignments

These should be updated for your company as appropriate - PART 2

User – email address	Topic	Common Classification
Senior Community Manager	Higher ed, Analytics, CRM spaces and social media conversations	Industry Discussion, Company Content
Training Team	Training and education for product users	Support/Troubleshooting
Event Manager	Company event-focused conversations	Company Event
Executive Team	Financial, speculation of sale, high-level business conversations, industry analysis	Industry Discussion
Agency Community Manager	Agency customers	Industry Discussion, Company Content
Content and Product Marketing	Webinars, website content	Company Events, Company Content

Post Assignments

What to do when you're assigned a post

1. Review post and ensure that you are the right person to be handling it. (if not, re-assign to appropriate person)
2. If responding publicly, follow the guidelines laid out in the Engagement section of this playbook.
3. Copy your response in to the notes section of the post you are responding to if applicable.
4. Update "Engagement Level" to reflect the current status of the post after your response/review.
5. Make sure to follow up on any posts assigned to yourself that have not closed.

Engagement

What to respond to:

- Mentions of your company as part of presentations or events
- Compliments of your product, service, or people
- Recommendations or referrals to your products and/or services
- Customer Service/Support issues or inquires
- Sales leads of product inquires
- Feature requests

Engagement

Examples of 140 character or less responses:

- Thanks for the mention!
- Glad we could help.
- I’d be happy to to talk to you more about this.
- Feel free to pass along any feedback you have.
- Let me introduce you to our support/training team. They’ll be in touch to help you out.

** After a mention, compliment , etc. make sure to follow (if not following already) from your company account

** These are examples of what can be said, please do not resort to “copy/paste” answers as every response is different and should be treated that way.

What you should not respond to:

- Generic mentions among a sea of competitors, without commentary that's positive or negative
- Sarcastic, snarky or potentially inflammatory comments
- Retweets of blog posts or news announcements, unless in low enough volume to respond individually
- Tweets from webinars or other online events
- Discussions/conversations between individuals that mention your company in passing in which your involvement could be perceived as intrusive

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What you should not respond to: (part 2)

- Posts in a language that you don't have the appropriate understanding or resources to respond to
- Posts/forum threads that require membership to respond to, unless it's a customer service issue, negative post or misinformation you need to correct

Engagement

What not to say:

- Unwarranted public apologies
- Any details about future product enhancements
- Any announcement regarding technical difficulties or service interruptions
- Profanity or inappropriate subject matter
- Reference to partners, customers, etc. that are not publicly known

Engagement

Twitter Favorites: What to favorite

- Positive feedback/reviews from customers and prospects
- Positive customer service comments

Twitter Favorites: What not to favorite

- Profanity or inappropriate subject matter (even if it's used positively)
- Mentions from employee's, partner's, etc.

Twitter Favorites: How to favorite

- Give a post tag of "favorite" and tag as favorite in your company's Twitter account

Duties for “On-Duty” Employee:

- Monitor “Alerts – Your Company” topic profile for all mentions of your company ** after hours/support shift to monitor for support/ technical issues and high level inflammatory issues
- Assign posts to appropriate team members for response and follow up
- Email posts to partners & follow up on their engagement
- Housekeep and close items (i.e. your own company posts)
- Update Source Tags as needed
- Ensure all users have reviewed/closed all posts they are assigned
- Integrate information into your CRM system as needed

Engagement

Monitoring Schedule

	M	T	W	T	F	S	S
9am-5pm	Community Analyst	Community Analyst	Community Analyst	Community Analyst	Community Analyst		
5pm-9pm	Support	Support	Support	Support	Support	Support	
9pm-5am*	Support	Support	Support	Support	Support		Support

* 9pm-5am monitoring if applicable to your company

** Community Analyst lunch time flexible depending on volume and day, community team members to provide support as needed

Engagement

Post

Posted on Oct 20. 2009 at 10:02PM
I'm trying to copy a widget and the recipient never receives it

Technical Support

- Engagement stage- Reviewed determining best response
- Classification- Customer Support
- Edit Notes/Tags
- Somewhat Neg Sentiment
- Post assignment to Customer Support

Radian6support

- Support Receives Post assignment
- Review Notes, source url, post details
- Edit Engagement stage as necessary
- Add notes/tags as necessary
- Resolve post
- Change engagement stage to closed when resolved

Reporting

Escalation scenario – as required, based on Severity Alert Guidelines

- Through post assignment and e-mails if need be

Weekly reports to give a quick summary of top issues and competitor stance

- In the form of an e-mail summary & copied dashboard available to anyone who expresses an interest

Monthly reporting to ensure Managed Listening Objectives are met

- In the form of a slide deck complete with insight and summary points

Ad hoc reporting for topics of interest or after specific company events

- In either slide deck or dashboard format