

SOCIAL ENGAGEMENT: TRENDS, CASES & THE NEW MODEL IN ACTION

PART FOUR

Listening & Monitoring

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LISTENING & MONITORING

Companies aspiring to be effective in social media engagement are often admonished that the first and most important step in achieving that goal is to establish an effective listening program. Indeed, the New Model encourages CCOs to examine their organization's listening (and measurement) instruments and to revise or augment them as needed to provide ongoing feedback. This is important for both practical and philosophical reasons: as a practical matter, listening to the online conversation is essential if one is to make effective decisions about when and how to join it. The philosophical point is that companies accustomed to one-way, outbound communications to customers and other stakeholders must accept that social media is a two-way proposition in which the mutual exchange of value is essential, and for which listening is indispensable. As the New Model argues, stakeholder engagement starts with shared belief. And this, in turn, is achievable only by understanding the concerns and beliefs of others.

Although the words “listening” and “monitoring” are often used interchangeably, it is useful to think of them differently: “Listening” incorporates the full spectrum of activities, including a formal monitoring program that draws understanding and insight from the online conversation. It ranges from the perceptive use of social media by an individual employee to a more formal research and analysis program that may be undertaken by the organization. It typically involves the use of paid and free tools to help sift through the mass of information on social media to identify communications that matter and to help assess their significance. In this connection there are overlaps with metrics and measurement, as an important aspect of any listening effort is quantifying what is being heard.

“Monitoring” is the aspect of listening that incorporates a formal system for identifying, in real time, pre-selected elements of the online conversation in which the organization has an interest, such as a group of influencers or posts on the company's Facebook page. Monitoring may serve a variety of purposes, including measuring a brand's participation in the conversation, and can be especially important in issues and crisis management.

Why Is Listening Important?

The report, *The Economics of the Socially Engaged Enterprise*, conducted by PulsePoint Group in collaboration with The Economist Business Intelligence Unit, found that those companies most successful at social media engagement (identified as “Thrivers”) recognized that listening was a critical step in enabling engagement.¹ They reported that listening initiatives contributed to increasing their market share, second only to C-Suite buy-in in terms of importance as an element of their social media success.

The research also found that responding to posts within hours is one of the best drivers of economic value from a social media program. And it is axiomatic that one cannot respond to what one does not hear. Social listening is critical to identifying opportunities to deliver value. Brands have long sought to speak the language of their customers; most spend hundreds of thousands of dollars conducting extensive market research. Now, with the right strategies and techniques, listening to social media can provide much of the information once gleaned only through other forms of market research.

¹ *Economics of the Socially Engaged Enterprise*, 2012, a study conducted jointly by PulsePoint Group and the Business Intelligence Unit of The Economist, www.pulsepointgroup.com/sites/default/files/SEE_Paper_4_27.pdf

What are the specific goals of listening?

- **Becoming more effective at joining the conversation:** An important principle of social engagement is that social communities already exist, and organizations/brands enter these conversations rather than creating them. Listening helps in a) making the initial determination whether or not to enter the conversation, b) what to say, and c) how to say it. It is easy to underestimate the importance of this last element; it is essential that the tone and style of any participation be appropriate to the particular conversation.
- **Identify potential product/service ideas and innovations:** Listening is an essential component of crowdsourcing, whether as part of a formal crowdsourcing effort or simply as a means of generating customer driven ideas on an informal or ad hoc basis.
- **Social CRM:** Careful social media listening is the starting point for “social CRM” – that is, managing the customer relationship through careful attention to what is being said online.
- **Provide an early warning system for issues:** Issues, whether individual customer service problems or bigger issues that threaten corporate reputation, escalate through a combination of traditional and social channels. Increasingly, issues that erupt in the mainstream media have been percolating through the blogosphere for weeks or months. As long ago as 2010, a Cision survey showed that 89% of U.S. journalists turned to blogs for story research² and it is likely that the percentage has only grown since then.

Building a Listening Program

Effective listening programs require a combination of listening tools and human analysts, together with codified escalation and evaluation processes. Indeed the New Model requires the CCO to be a “master of data analytics”:

“This goes beyond measuring the impact of an organization’s communications—as useful as that is. CCOs will need to build the capabilities to understand a broad range of their enterprise’s data, as well as the growing mountain of information produced in social networks—and they will need to be able to do so in real time. This is the only way to acquire an immediate understanding of how the enterprise is seen and understood by individuals, as well as headlights onto current and future performance and reputation... Importantly, data provides the means to understand and engage individuals at scale. The CEO and the C-Suite do not now look to Communications for this kind of expertise—but if the CCO does not provide it, they will find someone else who will.”

One might add it is also the only way for a company to intelligently deploy engagement strategies that depend on entering the online conversation with the right content, the right tone, at the right time, and directed at the right influencers. Or, equally important, refrain from situations where engagement would only inflame a bad situation.

Tools

There are a variety of listening tools on the market, among them:

- Radian6
- Viralheat
- Brandwatch
- Crimson Hexagon
- Sysomos
- UberVU

In evaluating these tools, companies must decide what the main goals of their listening/monitoring effort are. That being said, any tool should be able to:

- effectively measure and contextualize volume;

² National Survey Finds Majority of Journalists Now Depend on Social Media For Story Research – (Press Release)
<http://www.cision.com/us/about/news/2010-press-releases/national-survey-finds-majority-of-journalists-now-depend-on-social-media-for-story-research/>

- work across the growing variety of social media platforms;
- allow users to identify and follow key influencers;
- allow users to follow hot topics and be alerted by developments; and
- provide real-time content streams with tagging and sorting capabilities.

In addition, natural language processing technology and sophisticated search engines are helping boost the performance of these tools.

Larger organizations are establishing formal monitoring command centers with complete communications tools in order to permit not only real-time monitoring, but also the tools necessary to manage a crisis when a situation escalates to that point. In fact, it is important to establish escalation protocols so that content creators and others can act promptly on the information gathered from the listening program.

Analysts

The best listening initiatives have data and social media experts who are responsible for regularly reviewing and aggregating the real-time data and executing the appropriate response. These individuals need advanced analytical and statistical skills and the ability to recognize and act on escalation triggers. These analysts use listening tools to read and categorize posts and conversations in real time. In particular, they should be looking for influencer commentary, customer engagement opportunities, product/innovation ideas and emerging issues.

Who's Listening?

Because listening programs are indispensable to effective social media engagement, essentially every company with a major social media program has a listening component. Here are just a few worth noting:

- AT&T's active listening program provides real-time competitive intelligence, product/service insights and innovations, influencer intelligence, trend and issue awareness and sentiment analysis. A dedicated customer support team takes note of trends and engages in casual conversation to glean information from customers. AT&T builds conversations on Facebook around products, contests and sponsored events.
- Delta Air Lines established a Digital Media Lab at its corporate headquarters in Atlanta that brings together communications, marketing, and customer service employees in one location to monitor online conversations around the brand and respond in real time. Within a year of its establishment, sentiment around the airline in social media improved 7% and Delta was mentioned online more than any other U.S. airline.
- Teva Canada, a branch of the Israel-based pharmaceuticals company, realized a few years ago that it was in constant crisis mode and that the way out was to improve communication. In this instance, the most important listening was internal, so that supply chain dysfunctions could be resolved through early warning, crisis identification and improved inventory management. With employees now freely communicating with one another and listening to each other, the time it took to identify critical issues dropped from an average of two to four months to just a few hours. Service levels have improved as well, and the manufacturing cycle was cut in half.
- Cisco's listening strategy began with the creation of a playbook, which proved to be critical to how the company monitored, responded to and triggered conversations in real time. The playbook identifies "action-based conversations – ABCs" and prioritizes a response within 24 hours, within 72 hours, or when convenient. Launched in fall 2011,

the center was initially used to win C-Suite buy-in by demonstrating what types of data could be obtained through effective listening. “It all started after we saw what Dell and Gatorade created, but we had to investigate whether a similar command center was appropriate for a B2B brand like Cisco,” said Charlie Treadwell, who heads Cisco’s social and digital effort. The center consists of six primary screens and sorts through 3,000 to 5,000 online mentions per day.

What’s Ahead?

In an environment where new platforms seem to emerge with regularity – just over the past few years, for example, Instagram, Pinterest and Tumblr have entered the vocabulary – it’s likely that rapid change will continue. Some of the developments in listening/monitoring metrics are discussed in the Metrics section of this paper, but four trends stand out:

Mobility

The trend toward social interaction away from the computer and more on mobile devices will accelerate, especially outside the U.S. In 2012, a Nielsen/McKinsey report on social media found that time spent on mobile apps and mobile websites jumped 63 percent over 2011.³ In Africa, where the number of PCs per 1,000 people is still low, there will be almost 1 billion mobile phone users by 2015. A growing number of marketers are making mobile the centerpiece of their multimedia campaigns, and effective listening programs will need to incorporate mobile platforms and be accessible through mobile devices.

Consumers as Listeners

While we may think of listening as primarily a corporate activity, consumers are becoming more sophisticated listeners as well. They are increasingly using social media not just to post photos of their dinner but also to learn about others’ experiences and get information about brands, products and services. Search engines are one of the best listening tools for consumers. As a result, content optimized for search will continue to be exceptionally important when the data generated by an effective listening program is driven by an effective social media program.

“Social Intelligence” vs. Listening

As the first generation of social media listening and monitoring tools evolves into the next, there is greater emphasis on “social intelligence” – that is, insight beyond basic metrics. Often, this desire for greater social intelligence is linked to limitations in existing tools in measuring sentiment (as contrasted with volume).

Impact of Paywalls and Increased Privacy

The growing implementation of paywalls by media outlets such as *The Washington Post* is leading to a growing proportion of content shifting away from being free to visitors and subsidized by ad revenue alone. Incidentally, this brings more eyeballs to sites behind paywalls that may be more difficult to monitor via traditional means. Increases in demand for strengthened privacy settings, especially in Europe, may have a similar effect on the reach and accuracy of listening/monitoring programs and the data they produce.

³ Nielsen, “State of the Media: The Social Media Report 2012,” <http://www.slideshare.net/rosabermejo/the-socialmediareport2012-nielsen>

PRACTICE POINTERS

- The first step to effective listening and monitoring is to establish organizational goals. This is essential to guiding the formation of any effective listening and monitoring program. A company could be aiming to quickly spot emerging issues, forecast demand, gain key insights from its audience, perform a competitor analysis, pull excellent customer service insights or simply track conversation around their brand. Chevron, for example, even took it a step further to improve partner relationships. The bottom line is that goals must be established ahead of time to avoid getting lost in the noise.
- Next, the specific requirements of the company need to be identified. Certain features, like Natural Language Processing (NLP) or text processing can vary greatly from tool to tool. While some companies may need only one user on the tool, others might need fifty or more logged in at once. These types of parameters should align with organizational goals and need to be set ahead of time to ensure that the most appropriate tool is chosen.
- Once the tool is chosen, search building comes next. This initial listening is done by building a “query” – or a string of key words – that will capture every social mention relevant to a company’s brand, industry or competition. To move to a more intentional state of monitoring, the query can then be refined to further analyze conversation around a specific topic or among a select group of people to pull insightful information and metrics. Both monitoring and listening are essential to understanding the social conversation around a brand, and effectively engaging in real-time, two-way communication.
- As important as pulling this information is building protocols and escalation processes to be sure that the right insights are getting to the right people. The corporate branding team will require a different set of information than the technical support team, and so on. When routed to the proper groups, these insights should be formatted to show progress over time.
- Finally, businesses need to measure and optimize. Remember, data is power. Discover the types of content that resonate and receive the most relevant engagement to the organization’s original goals. If certain posts are not working, scrap them.

CASE STUDY



Social Media Case Study: Listening

The Challenge:

Chevron sought to keep a pulse on topics, trends, threats or crises related to the company; identify opportunities to engage with interested or influential stakeholders; and assure communities that they are being heard and that their concerns are being addressed in times of incident or crisis.

The Solution:

Chevron employs an always-on listening strategy; follows company detractors as well as advocates; regularly monitors and analyzes data with appropriate tools and trained resources to glean the most relevant business intelligence; and establishes social media as a key component of digital competency and crisis communications for its Public Affairs team.

Key Learnings:

One of the first steps that many companies take in social media is to listen to and monitor online conversations. Since 2007, Chevron has been using social media and various analytics tools to “listen” to online conversations about the company, its operations, industry-related issues, competitors, detractors and issues that are important to employees. Key learnings from the company’s listening practice include:

- Insights from monitoring and listening that allow optimized messaging to support the business or correct misinformation about the company or the industry.
- Real-time listening that allows Chevron to adapt to trends and issues – and respond accordingly. Through listening, the company is able to make educated decisions and positively affect business outcomes by having knowledge about what’s important to key stakeholders.
- It is critical to provide advanced intelligence to employees in multiple “on-the-ground” situations, like crisis events or protests, as well as to amplify positive coverage about Chevron.
- Listening allows Chevron to address community concerns in real time by posting answers on its social media channels to show it is attuned to the community’s concerns – and that it is listening.
- It is important that Chevron’s communicators – and, increasingly, the company’s business leaders – have fluency in social media’s impact on the business.
- Listening is an excellent place to start training colleagues to gain awareness of social media channels and what they are used for, and to teach them about content development for the various channels and how and where to engage stakeholders.

The company’s aim is to become fluent in analyzing all data intelligence to better predict issues, stakeholder actions, and to devise appropriate engagement strategies to manage above ground risks – or as Chevron says, “the geology above the ground.”

Real-World Example: Litigation in Ecuador

Texaco Petroleum (“Texpet,” a subsidiary of Texaco, which merged with a Chevron subsidiary in 2001) was a minority partner in an exploration and production venture with Petroecuador, Ecuador’s state-owned oil company. The production operation took place primarily on government lands and was conducted in compliance with Ecuadorian laws and regulations. Roughly 1.7 billion barrels of crude oil were produced, with the Government of Ecuador (GOE) receiving 95% of the total financial proceeds. At the conclusion of the oil production concession between TexPet and the government of Ecuador in 1992, the parties conducted a full environmental audit and Texpet performed a multi-year, \$40 million remediation program proportionate to its minority ownership share of the consortium.

That program was approved by the government of Ecuador, which then granted Texpet and all related entities a full and complete release from any remaining environmental liability associated with the consortium’s operations. Chevron soon found itself defending against allegations that it was responsible for alleged environmental and social harms in the Amazon region of Ecuador. For years, U.S. trial lawyers and their backers waged a campaign of misinformation against Chevron in an attempt to force a large financial settlement in the lawsuit.

Listening to the conversations about Chevron and Ecuador in the digital space has allowed the company to discern who the important online stakeholders are and what significant topics are being discussed.

“Our aim is to accelerate our knowledge and proficiency in how we use digital intelligence and analytics to better understand our stakeholders. Measuring sentiment, predicting behaviors, and drawing insights can enhance engagement to motivate stakeholders to take actions favorable to our business interests.”

- Dave Samson
General Manager, Public Affairs,
Chevron

This constant listening informs online response strategy, whether responding to a blog post, news story, Twitter conversation or the like. Chevron acts on the information gathered from listening and engages on platforms where discussions are taking place with those who have a real and objective interest in the case, such as bloggers. Chevron also hosts its own blog, The Amazon Post (www.theamazonpost.com), about the case and can address topics that are important to key online stakeholders on this site as well.



While listening equips the company to counter misinformation from paid activists and the plaintiffs' lawyers' surrogates, it also has learned that much of what they are promoting does not require additional action or resource allocation by the company.

For example, each May, the plaintiffs' lawyers and their allies would ramp up their pressure tactics around the time of Chevron's annual stockholder meeting. This was done using paid activists who would portray themselves as impartial, third parties through social media campaigns, blog posts, search and online advertising. These anti-Chevron messages were then echoed by additional affiliates. To the casual observer, it looked as though there was a large movement afoot. In reality, Chevron knows through listening that these efforts did not resonate with the general public or key stakeholders, and largely consisted of the lawyers' backers talking amongst themselves. The company has learned that engagement within this

"community" is not a fruitful exercise and only serves to legitimize an illegitimate cause.



CASE STUDY



The MasterCard Conversation Suite Case Study

The Challenge:

Three years ago, MasterCard CEO Ajay Banga challenged his team to transform the 45-year-old B2B financial services giant into a more consumer-focused payments technology company. From a communications standpoint, MasterCard was squarely B2B; the opportunity was to shift engagement online and develop a direct relationship and dialogue with consumers and influencers. Early data revealed more than 30 million online conversations weekly related to MasterCard and its industry; however, MasterCard was engaged in just 1% of those discussions. Further, commerce – the center of MasterCard’s business – was shifting online and increasingly via social media channels.

The Solution:

To move beyond traditional “listening” MasterCard created the Conversation Suite – a dynamic, global insights and engagement engine that shifted the company from monitoring social and traditional media to applying purposeful listening to inform business decisions and foster more impactful communications. Further, MasterCard built a number of content-led social channels to support its social engagement objectives and establish a more distinct, accessible voice and online brand identity to interact with consumers in the online community.

The Conversation Suite is a web-based analytics tool supported by a global team of social experts

“Today’s connected and transparent world has changed the way CCOs and their teams need to operate. It’s not enough to simply use the latest channels to tell our stories, but we must also capitalize on real-time data and analytics to drive specific outcomes. Through this approach, my entire global communications team now has access to the tools, data and insights to make those informed decisions. We’re engaging at an individual level to not only shape perceptions but also to trigger action that will ultimately lead to advocacy for our brand and our products.”

- Chris Monteiro
Chief Communications Officer,
MasterCard

that monitor, analyze and engage in conversations around the world in real-time, 24/7. The data mining and analysis serve as a foundation for communications decision-making, helping set the communications roadmap, enabling active response and engagement and serving as a barometer and resource to the business. It is also a physical space with hubs at Corporate Headquarters in Purchase, NY as well as in Miami, Mexico and Brazil along with a mobile version. The innovative location, featuring an LED screen that presents a ‘live’ look at conversations shaping the brand, provides a creative venue for discus-

sion and ideation around the MasterCard story. Additionally, MasterCard Communications has engineered the platform to go beyond serving as a communications tool to fueling insights that not only drive better business but also better partnerships. In 2012, MasterCard launched the Partner Plus program. Through this effort, MasterCard Communications exposes partners - including issuers and merchants - to Conversation Suite data and insights relevant to their businesses and industries, and also works collaboratively with them to develop and implement joint social media programs informed by the platform.

A customized, proprietary system designed by PRIME Research powers the Conversation Suite, providing communications visibility in 43 markets and in 26 languages across all social, online, digital and traditional channels. Advanced web intelligence, sentiment analysis, human validation and in-house coding all contribute to making this system the hub of MasterCard's engagement network.

Key Learnings:

Since implementing the Conversation Suite in May 2012, MasterCard has dominated the emerging payments dialogue, driving a 400% increase in online engagement within three months of the platform's introduction. Further, since December 2012, 125,000 social media users have created unique MasterCard content, stimulating 520,000 conversations and reaching an estimated 1.3 billion people – roughly one out of every six people globally.

Conversation Suite data and insights aid in the execution of communications campaigns in real time – whether in immediately identifying and responding to an issue or in facilitating creative

opportunities to position the brand with media, influencers and consumers. At the 2012 CTIA trade show, MasterCard product teams partnered with Communications to monitor and instantly respond to questions relating to MasterCard announcements, reinforcing messaging, clarifying misconceptions and refining positioning while also achieving 68% share of conversation among the company's competitor set. The company's press conference was live-streamed into the Conversation Suite to keep employees informed of developments while also tracking competitor announcements and dialogue, allowing MasterCard to enter into the conversation with its perspective.



The physical Conversation Suite has become a coveted destination for MasterCard employees, heightening awareness of the importance of the millions of online conversations shaping the brand and industry and serving as a flexible space for brainstorming and information sharing. The Conversation Suite has helped to evolve the company culture to be more open and collaborative. It has also helped the company demonstrate best-in-class engagement within the industry and meet the challenge of transforming MasterCard into a more consumer-focused, aware and insightful technology payment company.

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