

Katie Paine's Social Media Measurement Checklist

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, 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 tables that you will report results with.
- 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.
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Select a listening/monitoring tool

- Make a list of the search terms, e.g., companies, benchmarks, subjects, topics, issues or peer institutions you need to know about.
- Decide if your program is domestic, international or some combination of the two.
- Make a list of the channels you need to monitor:
 - Traditional media
 - Network TV
 - Cable TV
 - 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 organizations)
 - External Blogs
 - 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
- 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.

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

Decide whether you will be doing this work in house or will need measurement partners.

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.

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
 - Clickthroughs
 - Registrations
 - Conversions
- Make a list of the sales/lead data you will need:
 - Number of registrations
 - Number of leads
 - Number of qualified leads
 - Number of appointments made
 - Number of proposals delivered
 - Number of sales
 - Market share
 - Value of sales
 - Average profit per sale
 - Cost of social media program
- Talk to whoever within your organization manages the web site 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.

Select a survey tool

- Make a list of audiences you need to survey.
- Determine if there is a list available in house, or do 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
 - Exchange/Communal relationship level
 - Control mutuality level
- Draft a list of questions to which you need answers.
- Identify a professional expert, or an academic, 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.

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.

Miscellaneous

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