

DIY Digital Engagement Audits

September 2014

Version 1.0

Contents

Introduction	3
Limitations	4
Process overview	5
Preparation	6
Ethical consideration	7
Generating a taxonomy	8
Generating a query	9
Scope of search	9
Research phase	10
Toolkit	10
Data capture	12
Assistive data capture	12
Analysis	13
Mapping stakeholders	13
Reporting	13
Action	14
Monitoring	15
Internal audits	16
Annex A: Social Media Metrics	17

Introduction

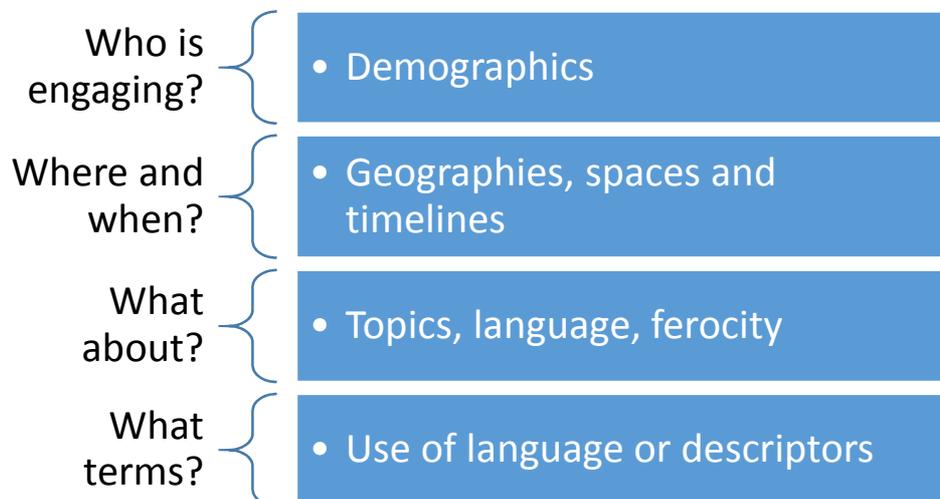
In this era of instant, digital communication, unprompted public opinion is voiced on the vast majority of topics somewhere online. Mass media fuels this phenomena, encouraging the public to comment on news stories and hosting their own (often un-moderated) forums. Citizen journalism and digital networks give rise to new and individualised sources of information, new modes of influence and engagement opportunities. Moreover, information seeking and sharing behaviours give rise to new insights.

In one sense this is not welcome as it serves to raise expectation and gives rise to misinformation. On the other hand it serves to build stronger communities and can be an outlet for the seldom heard.

Consider the various facets of an effective public discourse:-

- **Right people**
- **Right methods**
- Right time
- Right feedback
- Right questions

A digital audit is a way of answering a series of research questions relating to *the right people and right methods*, as illustrated below. Moreover, it is a way of identifying influencers and developing a nudge strategy for proactively managing online conversations.



The identification of digital networks is useful when considering proactive placement of dialogue.

Influencers are important as they:-

- Will have a strong following, readership and network
- Might be an authority on a place or a subject
- Can command action among their network

The objective of this guide is to build a framework for harnessing digital conversations for a number of purposes, such as:-

- Informing policy, decision making processes or consultations
- Identifying potential stakeholders and existing sentiment
- Identifying digital audiences, spaces and influencers
- Improving the quality of information, redressing the balance of misinformation
- Tracking trends and anticipating issues
- Being more responsive to citizen needs
- Improving take-up of formal participation opportunities
- Addressing the deficit of active listening on the digital channel
- Extending a network of contacts for later consultation
- Harnessing ideas and expertise

There is also some post analysis on digital gatekeepers required. For example, sometimes you can “post” content in a space but other times you need to pay or ask permission.

To put the activity in context, we have provided the following definitions:-

Digital engagement audit: Assessing the digital engagement opportunities that exist. Typically this inquiry is externally facing and extends beyond social media alone. Sometimes the assessment includes a review of *internal* capabilities and practices. Audits are likely to be undertaken periodically in preparation for a consultation or organisational development purposes.

Social listening: Tapping into social media for insights, normally around a specific issue or topic and over a sustained period of time. Likely to be used to inform discrete project work on an ongoing basis.

The process of undertaking the above follows a very similar methodology and to some extent this guide is interchangeable.

It is not a particularly lengthy undertaking but consideration should be given to the timeframe in which data is being captured. Subsequently we recommend audits which have an investigatory period of no longer than *five days*.

Limitations

The audit does not paint a complete picture of digital activity within any given report. Content is growing and changing constantly and reports are bound by the inputs such as the topics and terms used to define them.

There are also technical restrictions. For example, the ability to deep-search closed networks and forums as well as limitations around real-time information sources (although there are an increasing number of social media archive tools such as backtweets.com and <http://gnip.com>).

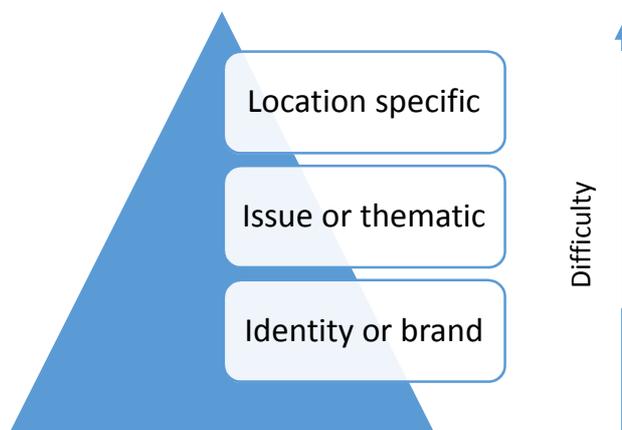
In categorising and organising data, researchers who conduct a digital audit make conscious choices about what is and is not included on the basis of their experience. It follows that a basic understanding of the focus of the engagement audit by the person who is conducting it is likely to result in a better outcome. Some of the tools have machine based learning which speeds up the process of coding or classification – typically this will still involve a 10% manual process.

Process overview

The digital audit is conducted in six phases, as depicted below. This report contains guidance on each phase.



The audit requirements will dictate how difficult it is to uncover content. For example, it should be relatively easy to find content using a broad geography and salient issue. We have classified digital audits in terms of their remit and difficulty rating below, notwithstanding audits may have a combination of factors under investigation:-



Preparation

There are six key inputs necessary for any digital engagement audit:-

1. Ethical consideration.
2. Existing digital insight (known spaces, channels, audiences). This might include “official” social media accounts as well as tacit knowledge about websites blog and digital influencers. In other words, it may be necessary to canvas officers and their existing knowledge and experience of the online world. You can even generate a baseline using tools such as Google AdWords Display Planner.
3. A focus. This might be a topic (thematic) or geographically orientated (for example, all activity around a particular place). It is also possible to run an audit around a personality, brand or term/trend. Digital engagement audits tend to work best when the focus is as narrow as possible and contains thematically centred topics with widespread digital presence.
4. A mandate for dealing with the output of the exercise. In other words, an action plan or agreement for dealing with the new insights and process for incorporating new voices alongside existing ones. Failure to do this is the difference between legitimate purposes and snooping/surveillance.
5. A taxonomy. The taxonomy is used as the basis for searches and is instrumental in determining the resulting quality of an audit. The process of defining an effective taxonomy is provided in later sections of this guide.
6. Filters. These are necessary to remove identify duplicates, false positives and cleanse your data.

Ethical consideration

At some point it will be necessary to ask the question 'Should we?'. It is worth remembering that most social media platforms are public spaces and participants often agree to forego their privacy as a term of membership. However, there is little awareness of this among contributors. Yes, the conversation is public – but meant for a certain audience; so when others listen it may be considered impolite or feel intrusive.

The public is not expecting policymakers to be listening so when does collecting insights become creepy?

How an engagement audit is perceived depends on the original intent. In other words, who's doing the listening and for what purpose. Listening because an organisation wants to be responsive and to engage better is not the same as surveillance.

Government needs to be open and clear that it is not listening to anything not already in the public domain. A clear and transparent methodology is vital; this can be achieved by making the process clear and sharing the outcomes. For example, stating whether or not a social media feed is monitored is one way of heightening transparency while alerting participants to the fact that their contributions may be analysed.

There are a number of key questions which need to be answered before conducting an audit:-

- Are the sources public (open to all?)
- Can any harm be done by aggregating this information?
- When data is collected, are individuals identifiable?
- Does the process invade personal privacy or cause any obvious harm?

As such, a suggested code of conduct is provided below:-

- No deception (research in the guise of marketing)
- No use of "wall garden" content (where the researcher must join or register a network)
- Take precautions against accidental exposure
- Be extra careful with sensitive information
- Do not use quotations or material that could be traced back to individuals
- Inform participants when an 'owned' digital channel is being mined
- Keep outputs open, share findings

Generating a taxonomy

The taxonomy is a set of unique, typically words, that can be used to *describe* the focus. This taxonomy must be weighted towards casual terminology. For example, in terms of taxonomy of place, local authority boundaries and postcodes are mostly irrelevant. People live in communities and the reach and geography of these are defined by the people – not by the data. Citizens describe the world in relation to the things that are meaningful to them and to other people in that world.

A number of sources can help you formulate the taxonomy. For example:-

- Preparatory desk research. This is used to uncover 'slang' and eliminate false positives. A project team with local knowledge can assist in the process of identifying suitable terminology.
- Existing insights and known boundaries (for example, geographic boundaries or known duplicates).
- Running analysis tools such as twazzup.com

Bear in mind that as it is unlikely the public are talking about the exact topic that we are interested in, looking for activity in adjacent or related topics that might lead people to interest in our core area.

It follows that in the creation of a meaningful descriptions, we recommend that some time being spent informally developing search terms to keep noise levels to a minimum and to ensure that the terms encompass the full diversity of views. For example, local words and phrases are useful but should not be used exclusively. Experimentation is key.

The final part of the process is to simplify the list of terms. Creating a grid or matrix will help maintain a systematic approach – it is possible that the taxonomy will need to be adjusted slightly if search terms fail to provide results.

Generating a query

Generally speaking a selection of queries in a Boolean combination will be formed to conduct a number of searches per tool. The selection can include very precise combinations as well as general, single term queries.

The syntax for Operators and Boolean logic vary depending on the tool. In general you will need to know how to:-

- Search for an exact word or phrase (e.g. by using quotation marks)
- Exclude a word from a search (e.g. by using a minus sign)
- Fill in a blank (e.g. by using an asterisk)
- Using logic (e.g. by using OR/AND operators)
- Use near (distance) or time based operators if they exist

Bear in mind that some search tools, such as Google, have “advanced search” pages to make structuring Boolean queries easier. For example, http://www.google.com/advanced_search. In Twitter, you can use smileys “:)” and “:(” to search for happy or downbeat tweets.

A resulting query may look something like this (example is searching for GM foods):-

*“((GM OR "genetically modified") NEAR/10 (scien*OR expert* OR tests)) NOT ("GMC")”*

Scope of search

There are umpteen social networks and internet spaces to investigate so a value judgement must be made about the most prolific and most active lines of inquiry. The table below indicates a selection of information sources but these may vary depending on your target audience and geographies.

Social Media	Search	Content	Insights
Facebook groups & pages	Google	Blogs	Google Search Trends
Twitter	Yahoo!	Forums (local/national)	Google Autocomplete
Pintrest, Instagram, Tumblr	Bing	Yahoo! Groups	Social bookmarking
Google Plus		Google +	eBay
YouTube			Ads
Flickr			Foursquare
Tumblr			

It stands to reason that the wider the investigation, the longer it will take. While it is reasonable to create a short-list of social media websites, we commend investigating a mix of these information sources.

Research phase

Generally speaking the approach is systematic in that each information source is queried in turn. A number of iterations may be necessary as the search terms evolve and are refined.

Toolkit

This guide focuses on the use of free tools but there are many and varied pay-for options, particularly for monitoring and analysing social media. The benefit of pay-for tools is that they are often able to query multiple networks at the same time but the large number of free tools and diversity which comes as a result of using different search methods is often adequate for creating a digital audit.

Internal audits can make use of built-in tools. For example, Facebook Insights provides data on user interaction with your Page, demographics, and performance over time. Only Page administrators, application owners, and domain administrators can view Insights data for the properties they own or administer. Insights is a free service for all Facebook Pages and Facebook Platform applications and websites.

The tools vary in terms of their functionality and the way that they collect data. For example, some tools look for search terms in the content of a feed while as other look for search terms in the user submitted profile of a particular social identity.

We have identified six tool types:-

- 1. Those that identify content (e.g. Google)**
- 2. Those that identify content trends (e.g. Google Insights)**
- 3. Those that identify influencers (e.g. Follower wonk)**
- 4. Those that identify sources (e.g. Socialmention)**
5. Those that analyse networks (e.g. Facebook touch graph)
6. Those that analyse content of an owned stream (e.g. Facebook Insights)

Types [5] and [6] are relevant for owned social media accounts.

While monitoring and coding tools can help with the collection of data sources, they are dealt with separately in this report.

The table below is not exhaustive but contains some popular and useful free tools which can be used to identify content and their corresponding features.

Tool name	Type	URL	Use
Google trends	Content Trends	http://www.google.co.uk/trends	Compare search volumes of keywords over time
Google Autocomplete	Content Trends	www.google.co.uk (delete search cache to use)	See top search phrases
Delicious	Identify content & content trends	https://delicious.com/	Reveal bookmarked content and frequency of bookmarking
Google blog search	Identify content	http://www.google.co.uk/blogsearch	Discover blog content
eBay search	Content Trends	http://www.ebay.co.uk/sch/ebayadvsearch/?rt=nc	Reveal online activity through keyword and distance search.
Socialmention	Identify content and sources	www.socialmention.com	Find associated keywords and information sources
Topsy	Identify content and influencers	www.topsy.com	For twitter only
Twazzup	Identify content and influencers and trends	www.twazzup.com	Identify influencers, content and associated keywords for Twitter only
Addictomatic	Identify content	http://addictomatic.com/	Identify content across a wide range of networks
Followerwonk	Identify content and influencers	http://followerwonk.com/	For twitter only, searches profile text

Data capture

For each positive result a number of facets should be recorded, such as:-

- Identity
- Location
- Influence score or Klout
- Followers
- Proximity (latest activity)

It may not always be possible to identify each of these facets and some identities will repeat over several networks.

Subsequently you may wish to further categorise findings. For example, content which has been created by elected members versus interest groups versus the media.

The ferocity of dialogue on each social network along with the types of topics under discussion should be noted. This is useful for framing the overall digital activity.

Insights are generally taken as genuine but data trustworthiness is worth considering. Factors which can help identify trustworthiness include:-

- The Source;
- Source reputation and authority;
- How recent the information is;
- How well corroborated the information is;
- How information is presented.

Assistive data capture

The process of collecting evidence can be assisted with the use of qualitative data capture tools. A systematic approach is necessary to keep accurate and consistent records for later analysis.

There are a number of tools to assist with this such as Darzin and QSR Nvivo. QSR Nvivo has the ability to capture social media streams (Twitter, Facebook, YouTube, LinkedIn) in addition to email and web pages for later evaluation. Discovertext (<https://discovertext.com/>) is particularly powerful in finding social media data with historical feeds, polling and duplication/near duplication detection.

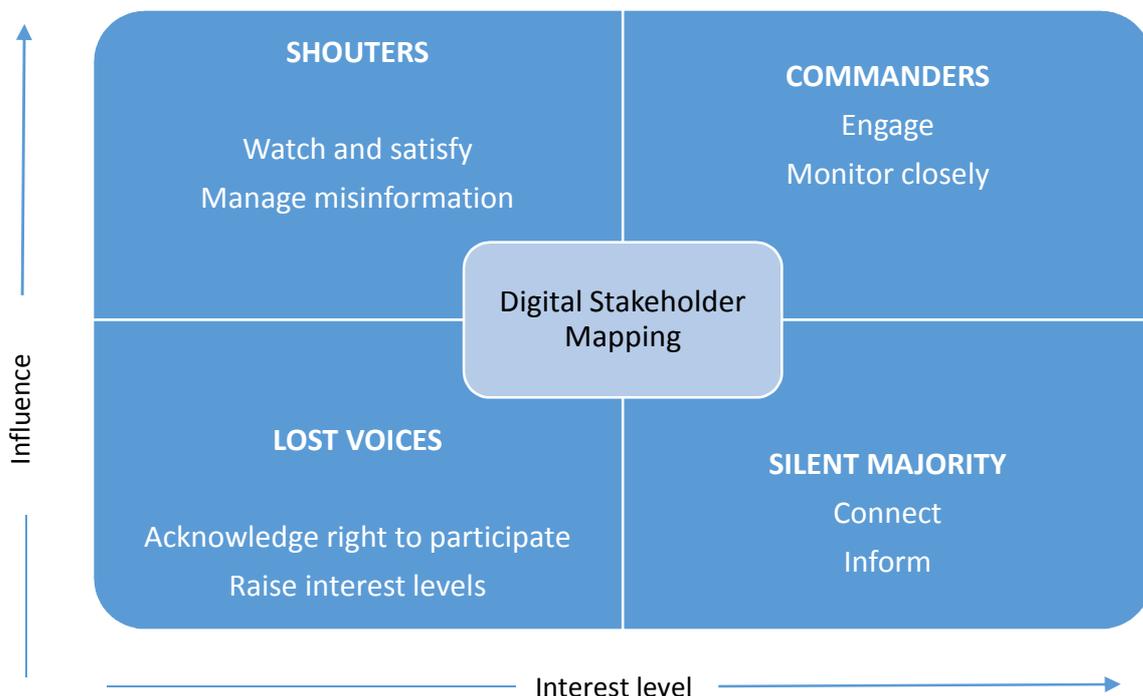
Qualitative data analysis tools can therefore assist in archiving the evidence, analysis of social media, coding of content and identification of data patterns.

Analysis

Mapping stakeholders

An important outcome of the engagement audit should be to both identify and classify influencers. Creating a priority tier of digital stakeholders will maximise the effectiveness of any future digital engagement activities.

Diagram 1.0: Persona based mapping matrix



Reporting

A skeleton report structure is provided below. It is important to avoid naming individuals but is compelling to include case studies or anonymised quotes.

1. Introduction
2. Baseline (e.g. demographic) and expectations
3. Search methodology
4. Executive summary (outline results)
5. General observations
6. Network by network breakdown
7. Summary of findings
8. Analysis of findings
9. Action plan

Action

The action plan is a way of acting on the gathered intelligence. In the first instance, we encourage findings to be shared internally, particularly among communications executives. An immediate next step is to alert or identify any immediate concerns among affected parties. For example, time critical conversations or unforeseen issue that have been identified during the process.

Depending on the nature of the audit a third, optional step, is to gather a public meeting of identified influencers. The aim of this is to make the results of the audit known publically but also to aid the investigation, create a more cohesive community of ambassadors and demonstrate that you have been actively listening.

A number of research questions can be used to shape this session:-

- Where do they get their information from?
- Who are they closely aligned with?
- Who do they trust?
- What do they think now?
- What do we want them to think?
- What do we want them to say when they talk about us?
- What are the wants and needs from digital engagement?

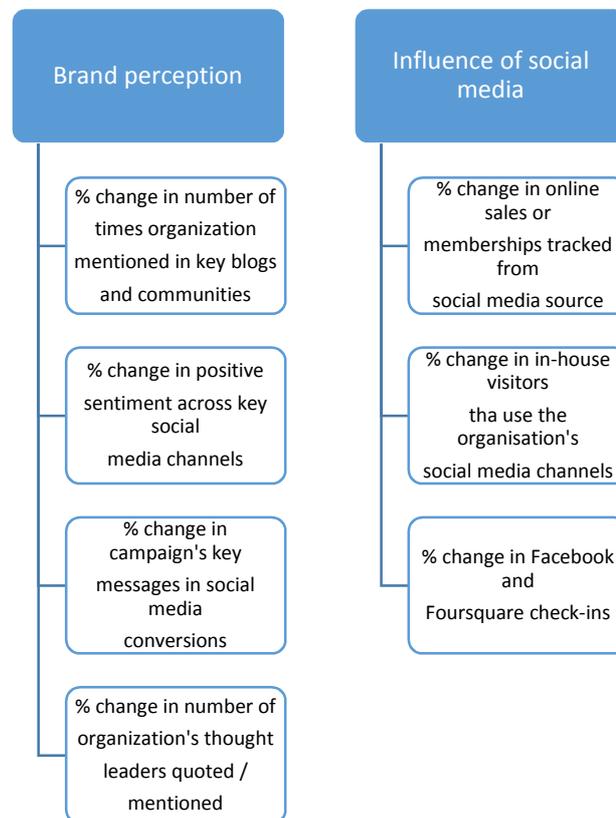
Finally, it is necessary to act on the stakeholder mapping matrix. The requisite here is to have a digital engagement strategy or social media guidelines in place as some of the actions are proactive compared to being traditionally reactive.

A typical strategy is as follows:-

- Lost Voices: To raise the interest level among his group, say hello.
- Silent Majority: Inject relevant and timely information into the network. Create lists and collections.
- Shouters: Follow and monitor.
- Commanders: Follow and interact. For example, if you hear a problem or query, solve it!

Monitoring

Once a digital landscape has been mapped, it is easier to monitor and track. The following diagram contains metrics that can be used to determine the ongoing influence of digital conversations on a campaign, project or brand. An extension of this can be found in Annex A.



Organizations can also track and measure their clout with www.klout.com, a tool designed to gauge individual and brand influence. Klout scores are based on how many people engage with the person/entity being measured, the probability of that person's/entity's content being shared, and the influence of that person's/entity's followers. Similar tools include <http://www.howsociable.com/>.

For long term monitoring, dashboards and alerts are recommended. There are a number of tools which can be used for this such as <http://www.swixapp.com/>, <http://www.google.com/alerts> and <https://en.mention.com/> although not all of these are free. Commercial grade tools include CrowdcontrolHQ and Radion6.

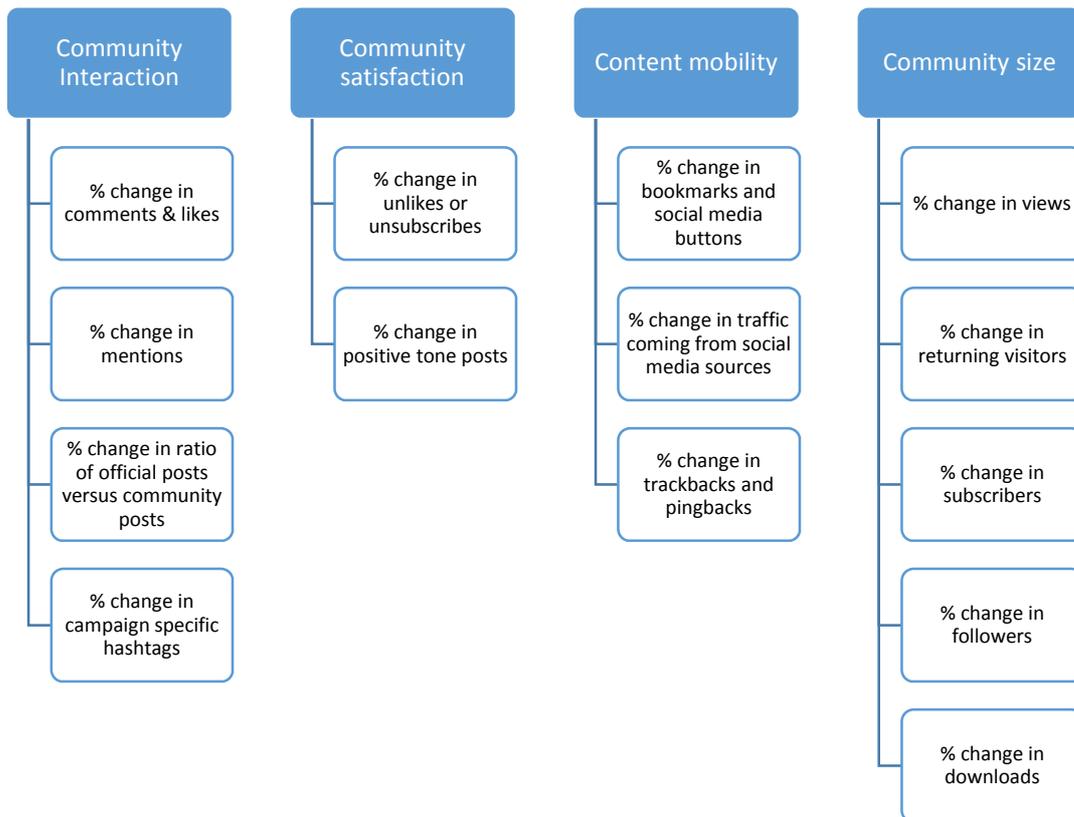
HootSuite is a popular dashboard - users can also incorporate Facebook Insights and Google analytics into their HootSuite dashboards. We also commend www.geckoboard.com for aggregating real-time data from multiple sources such as Google Analytics, Twitter and Facebook across multiple accounts.

Internal audits

There are a number of tools for analysing corporately held social media accounts, including those embedded within the service. These include <http://knowyourfollowers.com/>, <http://www.demographicspro.com/> and <http://www.touchgraph.com/facebook>

However, a cumulative view of activity is required to assess the situation.

The diagram below provides details for four measurable facets of digital engagement which correspond to organisational aims and objectives.



Annex A: Social Media Metrics

Facet	Index 1	Index 2	Index 3	Index 4	Index 5	Index 6
<p>Community Size</p> <p>Monitor change in size of the social media community - report on a monthly basis</p>	% change in no. FB fans / Twitter followers (FB / Twitter account stats)	% change in website or blog content views / downloads (Google Analytics)	% change in Vimeo / YouTube subscriptions (Vimeo / Youtube account stats)	% change in blog RSS subscribers (Feedburner)	% change in website or blog returning visitors (Google Analytics)	
<p>Community interaction</p> <p>Monitor changes in the amount of interaction received through comments, posts and mentions - report on a monthly basis</p>	% change Facebook post interaction (FB comments + likes / total number of impressions) (FB Insights)	% change in no.blog comments written (Wordpress)	% change in no.Twitter @ mentions	% change in ratio of organization's FB posts to user comments / replies (FB insights + manual calculation)		
<p>Customer satisfaction</p> <p>Monitor changes in unsubscribe rates, and also the amount of positive feedback received - report on a monthly basis</p>	% change in FB page "unlikes" (FB Insights) and Twitter unfollowers	% change in no. positive FB posts in the last 100 (FB account - manual count	% change in no. positive blog comments in the last 100 (manual count	% change in no. positive Twitter mentions in the last 100 (Twitter account - manual count)		
<p>Social content mobility / virality</p> <p>Monitor changes in social use of organisation's online content by social media users - report on a monthly basis</p>	% change in number of likes / diggs / shares etc from embedded social media buttons on organisation's website (reporting by web team ? Google Analytics / Google +1 metrics, Google webmasters tools)	Change in % of web traffic coming from social media sources (Google Analytics - Seb's segment, plus track bit.ly or ow.ly usage for specific campaigns)	% change in Twitter retweets of the organisation's Twitter posts (suggest trying Crowdboosters for this - currently in Beta crowdboosters.com)	Top retweets (Crowdboosters)	% change in YouTube / Vimeo content views generated by shared / embedded content (Youtube / Vimeo account stats)	Percent change in blog and web content trackbacks / pingbacks from content that has been linked to or referenced (Wordpress or Drupal)

Facet	Index 1	Index 2	Index 3	Index 4	Index 5	Index 6
<p>Brand perception</p> <p>Monitor changes in the brand position, message resonance and positive sentiment as the result of a specific campaign - report at the end of the campaign (NB. Need to benchmark stats at the start of the campaign)</p>	<p>% change in number of times organization mentioned in key blogs and communities)</p>	<p>% change in positive sentiment across key social media channels</p>	<p>% change in campaign's key messages in social media conversions</p>	<p>% increase in topical content coverage</p>	<p>% change in number of organization's thought leaders quoted / mentioned</p>	
<p>Influence of social media</p> <p>Monitor the change in social media influence on visits and sales - report every 3 months</p>	<p>% change in online shop sales / ticket sales / memberships tracked from social media source (Google Analytics)</p>	<p>% correlation between social media conversations and ticket / membership sales (NB. This one is campaign specific - use it to compare the influence of social media with other marketing channels)</p>	<p>% change in in-house visitors tha use the organisation's social media channels (MHM visitor surveys</p>	<p>% change in Facebook / Foursquare check-ins (Foursquare / Facebook page stats)</p>	<p>% change in quality and sentiment of place reviews (Foursquare / Facebook page stats)</p>	