Best Practices

PR & Communications Use Case Guide: Reputation Monitoring & Tracking
Who this guide is for:

PR and Social teams responsible for crisis management and defending their brands. Members of those teams who are seeking to more proactive in their issue response and get ahead of the curve on potential brand risks.
OVERVIEW

When most brands consider issue management, the first thought is towards rapid response. But what is an immediate response that is ill-informed or misdirected? This use case guide will help your team know when to respond, how to respond, measure the response, and know when not to respond.

The framework below can help to envision the lifecycle and approach to issue management:

This guide focuses on Phase I—Issue Tracking. Please check the PR Response & Measurement guide for Issue Response & Measurement.
MONITOR AND TRACK

The best way to prevent an issue from becoming a crisis is to prepare for as many possibilities as possible in advance. The configuration for issue tracking relies on four steps:

1. Scope the universe of issues
2. Determine benchmarks for each issue type
3. Set alerts based on benchmarking analysis
4. Create high-level process/requirements for responding to each issue type

Scope the Universe of Issues
The framework below can help to identify issues for consideration:

<table>
<thead>
<tr>
<th>ISSUE TYPE &amp; Competitive Monitoring</th>
<th>ISSUE TYPE</th>
<th>DEFINITION</th>
<th>CLIENT EXAMPLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand Issues &amp; Competitive Monitoring</td>
<td>Reputational Risk</td>
<td>Potential negative attributes associated with your brands or products</td>
<td>Employee Issues, General Negatives, Recall/Litigation, list of known detractors</td>
</tr>
<tr>
<td>Customer Service</td>
<td>Daily consumer feedback</td>
<td>Service, network issues, broken, taste, price, etc.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Category Monitoring</th>
<th>ISSUE TYPE</th>
<th>DEFINITION</th>
<th>CLIENT EXAMPLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Issues</td>
<td>Unbranded, common discussions that could have negative undertones</td>
<td>Processed foods, Sustainability, Fracking, Living wage</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Influencer Monitoring</th>
<th>ISSUE TYPE</th>
<th>DEFINITION</th>
<th>CLIENT EXAMPLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversation Drivers</td>
<td>Industry movers and shakers who affect the discussion</td>
<td>News/Journalists, Politicians, Professionals/Executives, Researchers/Experts, Celebrities</td>
<td></td>
</tr>
<tr>
<td>Known Detractors</td>
<td>Activists or others who consistently talk about the brand and/or category</td>
<td>PETA Animal Activists, Consumer Advocacy Groups, Generic Frequent Detractor Audiences</td>
<td></td>
</tr>
</tbody>
</table>

Benchmark Issue Types
After listing all issue types to be monitored, we can now build the assets necessary to track each issue. The reason to benchmark is to understand relative volumes to better inform your response to a given issue. With benchmarking, group the issues into similar types so you can judge: total volume for the life of an issue, average net sentiment, and total life of an issue (how long did it last).

Here are a couple real-life client examples that demonstrate the importance of benchmarking:

1. For a restaurant company with high-volumes of conversation 500 negative brand mentions a day might be common. However, if the volume exceeded 200 mentions in an hour or exceeded 700 for the day, the social team knew to notify PR of the issue.
2. For an energy company, more than 10 service issues in a day pointed towards either a potential outage or larger customer issue.

For company #1, 50 negative mentions were a normal occurrence. For company #2, that could be a major issue.

The best practice for building your Issue Monitoring benchmarking in NetBase includes:

<table>
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<tr>
<th>ISSUE TYPE</th>
<th>ASSETS REQUIRED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand Issues &amp;</td>
<td><strong>TOPICS:</strong> Build a broad Brand topic (for your brand and/or competitors)</td>
</tr>
<tr>
<td>Competitive Monitoring</td>
<td><strong>THEMES:</strong> For each issue to track, build an expansive set of keywords or other filters; use excludes as necessary for higher accuracy</td>
</tr>
<tr>
<td>Category Monitoring</td>
<td><strong>TOPICS:</strong> Build a broad category topic using keywords to capture the conversation around the specific issue</td>
</tr>
<tr>
<td>Influencer Monitoring</td>
<td><strong>TOPICS:</strong> Build an author based topic to monitor what is being said by specific individuals (up to 1000 authors and/or domains)</td>
</tr>
</tbody>
</table>

Once you have built the topics and themes as listed above, you can then analyze each to understand normal volumes for your brand, competitors, categories or influencers.

**Set Alerts based on Benchmarking (Optional, but Recommended)**

Setting an alert in NetBase requires two steps:

1. **Save an Analysis** ([https://app.netbase.com/cb/help/ic2/?page_id=15587](https://app.netbase.com/cb/help/ic2/?page_id=15587))
2. **Set an Alert:**

Saved Analysis allows you to set filters so to refine your benchmarks for alerts. Here are a few common saved analyses that are used:

- Brand/Product Topic + Issue Theme also consider the layers below
  - Followers Filter > 1000 (to identify Influencer mentions)
  - Geography (to filter to specific regions)
  - Day & Hour (to restrict to certain day-parts)
  - Sentiments = Negative

Once you have saved an analysis, you can then set your alerts. If you’d like to receive an alert every mention of your analysis, use Any Mention Alerts (pictured) Any mention alerts will trigger every 15 minutes if the analysis condition is met.

Examples of Common
Any Mention Alerts:
  • High risk issues
  • High influencer mentions
  • Detractor mentions

Another common use case for Any Mention alerts is to do a “Daily Digest.” Choose Every 24 Hours and NetBase will send you all of the mentions for the day in a single alert.

If you’d like to receive an alert on a calculation of your analysis, use Any Metric Alerts (pictured). Most times, customers set the time period alert for the last day or last week—that will trigger an alert hourly or daily if your calculation is true:

Examples of Common Any Metric Alerts:
  • Net Sentiment changes by X
  • Mentions exceed X

Real-Life Examples:
  • Brand + Service Issues Theme + Negative Sentiment exceeds 20 mentions
  • Category Issue Topic net sentiment drops below -20

Establish Process based on Issue Type & Severity
The final, often overlooked, piece of crisis management is having a process in place for when these emergencies occur. Usually, a PR department has pre-defined rules in place for handling certain types of crises so it is best to check with your internal PR or Communications teams for their standards.

When laying out the process, consider the following criteria:

1. Issue Severity: How critical is the issue to the business—meaning, do I need a Director involved? My VP? Or the C-Suite?
2. How Large/Negative is the Issue: Based on my benchmarking—is this issue: Green (send a warning), Yellow (gather resources for mitigating action) or Red (prepare a response team)?

Based on the above, a high-level matrix can be developed to plan for your responses. Better to keep it simple and have the right team notified rather than over-engineer the process. See an example on the next page:
### CLOSING

Reputational issues can have a material impact on your brand. Some are unpredictable and will require rapid response. Others can at least be monitored and tracked.

To stay ahead of the curve and maximize your chances of early warning:

- Monitor your brand and industry issues for spikes in conversation—by sentiment or volume—that may indicate new trouble spots for tracking
- Track known brand and industry conversations for negative associations that may be flaring up
- Develop benchmarks by issue type to understand severity, size and virality of an emerging conversation
- Create a robust alerting suite for leading indicators and always-on analysis
- Build a crisis response plan (Green/Yellow/Red) to take the guesswork out of responsibilities when an issue arises

All of the above will help proactively protect your brand’s reputation. In the next guide, we will dive further into how to respond and measure effectiveness of that response once an issue escalates.
NetBase is the social analytics platform that global companies use to run brands, build businesses, and connect with consumers every second. Its platform processes millions of social media posts daily for actionable business insights for marketing, research, customer service, sales, PR and product innovation.

NetBase is recognized by analysts and customers as the leader in Social Analytics. NetBase was rated a category leader by Forrester in the “Forrester Wave: Enterprise Social Listening Platforms, Q1 2016” report. NetBase was also named a top rated social media management platform by software users on TrustRadius and a market leader by G2 Crowd.