#### Microsoft Social Engagement for Dynamics CRM

Gain real-time understanding of your customers and your business across the social web within Dynamics CRM.

Version 3.1





#### contents

#### This eBook covers:

- Why Social Engagement for CRM?
- <u>Create records in CRM from a post in Social Engagement</u>
- Set up Social Engagement dashboards and visuals in CRM
- Gallery of Social Engagement visuals
- Next steps and help resources



# gain valuable social insights right in CRM

Sales, marketing, and service organizations can link posts to Microsoft Dynamics CRM and gain insights right within CRM.

**Social Insights**<sup>1</sup> lets you add charts and graphs to dashboards right in CRM, or add them to the forms for different types of records, such as accounts, contacts, or competitors.

Link posts from Social Engagement to Dynamics CRM<sup>2</sup>

lets you create any type of CRM record (entity) from a post in Social Engagement.

Read more about how Social Engagement works and how it can help your business in the <u>eBook:</u> <u>Introducing Microsoft Social</u> <u>Engagement</u>.



Add social dashboards and charts to view and act on social media events in CRM

<sup>1</sup> Available in Microsoft Dynamics CRM Online Spring '14 and CRM 2013 Service Pack 1 (SP1) or later

<sup>2</sup> Available in Microsoft Dynamics CRM Online 2015

# lead generation and social insights for sales

#### Social buying signals

Create real-time alerts for key purchasing signals and generate leads from the social web.

#### **Competitive intelligence**

Gain important insights about your competitors' weaknesses and strengths.

#### Target account tracking

Monitor key developments and decision makers at your top accounts.



**51%** of salespeople who use social selling techniques outperform their sales peers. (Source)

# real-time social listening for marketing

#### **Brand & product sentiment**

Gain insight and learn what people really think and feel about your business.

#### **Campaign monitoring**

Measure the effectiveness of marketing campaigns on social channels.

#### **Top influencer tracking**

Identify and monitor the top influencers in your industry, company, and customer base.



**75%** of B2B buyers are likely to use social media to influence their purchase decisions. (Source)

### extraordinary social care for service

#### New standard in social care

Engage customers, on their terms, across the social web and create cases in CRM.

#### **Global sentiment analysis**

Track social care cases in up to19 languages. For more information, see the <u>Translation</u> <u>Guide</u>.

#### **Real-time social case resolution**

Improve resolution time creating alerts to quickly identify customer issues, and identify trends early on.



**72%** of customers expect a response to a complaint within 1 hour on social media. (Source)

### link social data to CRM records\*

Open up the social channel to Sales, Marketing, and Service functions in CRM by associating social posts in Social Engagement with CRM record types – leads, opportunities, cases, or custom record types.

=	Microsoft Social Engagement		Analytics
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	CRM Record Insights		
	Entity: Case		Instance: Contoso
	ID: 0123456789	Priority: High	Owner: Corrine Espinoza
	Response By: 4:21 PM, 4/21/2015	Status: In progre	ress
	▷ Show Notes		Unlink

#### Tip

Before you can create records in CRM, an administrator needs to <u>set</u> <u>up the connection to CRM</u> and <u>configure the rules to process social</u> <u>activities</u>.



### link a post from Social Engagement to CRM

١		Social Engagement			
1	Isual	Studio Code ·	✓ <sup>®</sup>	$(\underline{A})$	
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	Create reco	rd in Microsoft Dynamics CRM			×
	-	v create records from the curren	nt post.		
	Instance			Entity	
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	Notes	2		3	
	You can ad	d up to 250 characters of notes	for other users to see i	in Social Engagement when interacting with thi	s post.
				4	Create

From Social Center or the Posts view in Analytics, click this icon to create a new record in CRM.

1

Select the CRM instancethat you want to create the record in.

Select the record type

- **3** you want to create and add optional notes.
- Choose Create totrigger the creation of a CRM record.

# view CRM record in Social Engagement

	Microsoft Social Engagement 🗮 Analytics	From Social Center or
$\lor$	isual Studio Code 🗸 🎭 💿	Posts view, click the Link to CRM icon
O	erview Conversations Sentiment Location Sources	
>	$\square$ SELECT ALL $\blacksquare$ Change label $2$ assign $3$ edit sentiment $\times$ remove	
POSTS	Image: Spain	Choose <b>Open Record</b> to see the record in Dynamics CRM.
CR	M Record Insights 2 b OPEN RECORD X	, the second
Er	Instance: Contoso	
1D 01	Priority:     Owner:       23456789     High     Corrine Espinoza	You can see the
	sponse By: Status: I1 PM, 4/21/2015 In progress	3 current state of the CRM record directly in
⊳	Show Notes 4 Unlink	Social Engagement.
	Tip	Choose <b>Unlink</b> to

You can click the owner or customer

to open the owner or customer record in Dynamics CRM.

**4** remove the link to the

CRM record.

# let's try it in CRM!

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#### To use Social Engagement in CRM, you'll need:

- Access to the Social Engagement app in Office 365. (For CRM Online admins: Social Engagement and CRM Online must be on the same tenant.)
- User licenses for both CRM and Social Engagement. More information: <u>Assign a license to a user</u>
- A connection between CRM and Social Engagement. More information: <u>Connect to Microsoft Social Engagement</u>

If you have questions about these items, please contact your system administrator.



# show Social Engagement widgets in CRM

Now that you know a bit more about what Social Engagement can do, you're probably ready to add your own visuals or set up searches.

There are two places where you can see the Social Engagement visuals in CRM:

- Dashboards
- Forms (account, contact, or competitor forms or on other types of records, depending on how your system is set up)

For our example, first we'll add the **Analytics Summary** visual to a dashboard.

Microsoft Dyr	namics CRM 😑 Sales 🗸 Accoun	ts   🗸 🛛 Blue Yonder Airline   🗸			O	Ð
+ NEW 🐻 DEACT	IVATE CONNECT - RADD TO MARKETING LIST	assign 📼 email a link 🗙 delete	•••			
Blue	້ Yonder Airlines (sam	nple) <sub>"≡</sub>				
Summary						
ACCOUNT INFORM	ATION	Social Insights				山の
Account Name *	Blue Yonder Airlines (sample)	T DYNAMICS CRM				
Phone	555-0154	-				
Fax		Analytics summary				
Website	http://www.blueyonderairlines.com/					
Parent Account			7			
Ticker Symbol	-	798	406.1%			
		posts	> average			
ADDRESS		114 per day	average 326	8.9 / -0.6	EN DE	
9068 Muir Road		Buzz	Trend	Sentiment	Languages	
Los Angeles, KA 2059	93	Microsoft Social Engag	ement			

# add a Social Engagement visual to a new dashboard



The **Analytics Summary** is a good place to start because it gives you a quick summary of the number of posts, how your search topics are trending, and the breakdown of positive, negative, and neutral posts.

You can also see which languages are used most often for posts.

First, because we want to monitor the social conversation right away when we sign in, we'll add the summary visuals to a new dashboard.

#### Tip

At the end of this eBook, we've included a <u>section</u> that shows you all of the visuals that are available. Feel free to use one of those, if you like. You follow the same basic steps to add any visual to a dashboard.

### navigate to your area

If your screen looks like this (latest version):

On the nav bar, choose **Sales, Service, or Marketing.** 



#### If you're the CRM admin at your

**organization,** and you want to create a dashboard that everyone can use, on the nav bar choose, **Settings.** 



If your screen looks like this (older versions):

-OR- Choose Microsoft Dynamics CRM > Sales, Service, or Marketing.

Microsoft Dynamics CR	M 🗸 🏦   SALES 🗸	Dashboards $\mid$ ~
SALES	<b>کپر</b> SERVICE	MARKETING

If you're the CRM admin at your organization, and you want to create a dashboard that everyone can use, choose Microsoft Dynamics CRM > Settings.

Microsoft Dyna	mics CRM 🗸 🚹   SALES 🗸	🗸 Dashboards   🗸	
sales	SERVICE	MARKETING	🔅 SETTINGS
			$\frown$

### go to dashboards

Admins and end users can set up their own dashboards. Optionally, admins can create new dashboards and share them with other users.

-OR-

If you're in sales, service, or marketing,
and want to create a dashboard for yourself,
choose <b>Dashboards</b> .



If you're the CRM admin and want to create a shared dashboard, choose Customizations > Customize the System > Dashboards.





#### create a new dashboard

We'll create a new dashboard for Social Engagement.

-OR-

If you're in sales,	service, or m	narketing,
choose New on th	e command b	oar.

Microsoft Dynamics CRM = Sales - Dashboards - Dashboards - Dashboards - Save AS Save AS EAVE Delete - Set AS DEFAULT S SHARE DASHBOARD

#### If you're the CRM admin, choose New on the toolbar.







### choose the dashboard layout

3-Column	3-Column	4-Column	2-Column
Regular Dashboard	Multi-Focused Das	Overview Dashboard	Regular Dashboard
2-Column	<u>3-Column</u>	3-Column	This layout can accommodate components
Regular Dashboard	Overview Dashboard	Focused Dashboard	across two columns.

In our example, we'll choose the 2-column layout so that we can eventually include four Social Engagement visuals on the dashboard.

You can choose a different layout, if you like.

On the **Choose Layout** screen, choose **2-Column Regular Dashboard**, and then choose **Create**.

### start the Social Engagement wizard

Microsoft Dynamics CRM = Sales - Dashboards -	Type a name for the
🗟 SAVE 🗶 CLOSE 🏟 PROPERTIES 🏟 EDIT COMPONENT 🏨 CHART 🗮 LIST 🔀 WEB RESOURCE 🚥	new dashboard.
Secial Engagement Dashboard	Next, we need to decide on the search topics to listen for on social networks. The <b>Analytics summary</b> visuals will report on these topics. There's a wizard to help with that. Choose <b>this icon</b> to start the wizard.

# add your search topics



#### Choose **Search topic**, and then select **Create a new search topic**.

You'll see a screen with fields to use for your own search topics.

- 1 Switch between selecting from a list of topics, or setting up your own.
- 2 Searches may be grouped by category (record type), such as for accounts, competitors, or contacts.
- 3 Enter keywords, separated by commas. Keywords are exact, but not case-sensitive. Include variations ("phone" and "phones").
- 4 Narrow your search by requiring these additional keywords in results (think "AND").
- 5 Use exclusions to avoid overwhelming your results with irrelevant keywords. Posts that also contain these keywords will be excluded (think "NOT").

#### Tip

To learn more about how to set up your own search topics, see <u>Set up</u> <u>searches to listen to social media</u> <u>conversations</u>.

set up socia	al Insights		? X
Set search topic type	Set search topic or category	Select visuals	
<ul> <li>Pick a search topic</li> </ul>	Create a new search topic		
Name for this search topic *	Select a catego	ory for this search topic $2$	
	Accounts		~
	in results 4. Keywords that	must be EXCLUDED from results	5
Example: Microsoft, #microsoft Keywords that must be INCLUDED Example: Office	in results 4. Keywords that		5
Keywords that must be INCLUDED			5
Keywords that must be INCLUDED	Example: build		5

### or, take advantage of pre-set search topics



### select the search topic to listen for

Set up Socia	l Insights		? ×
Set search topic type	Set search topic or category	Select visuals	
<ul> <li>Pick a search topic</li> <li>C</li> <li>Search topics list</li> </ul>	Create a new search topic		
Name	Keywords		
Printer products	ink jet, laser printer, all-in-one, photo printer		^
Toner cartridges	remanufactured cartridges, refill kits		
3D Computer-aided Design (CAD)	CAD software, wireframe, design modeling	<b>~</b>	
Plotter products	flat bed plotter, drum plotter		
			*
		Back	Next

 $\supset$ 

### pick a visual

Set up Socia	l Insights		? X	Because the visuals give a
Set search topic type	Set search topic or category	Select visuals		good overview of the results of the search, we'll pick the <b>Analytics summary</b> .
+ Add visual TOPIC NAM	IE: 3D Computer-aided Design (	(CAD)		Analytics summary.
Visual name	Description	Sample		<b>Tip</b> You can add more than one visual in
1 Analytics summary	Get a quick summary of the number of posts, how your se	Print − CR Print − CR printer − CR Print	× الله	this wizard.
↑↓ MOVE		Back	Finish	Choose the down arrow, and then select <b>Analytics summary</b> . Choose <b>Finish</b> .

### save the dashboard and close

Microsoft Dynamics CRM = Sales - Dashboards -
B save × close ✿ properties ✿ edit component ill chart ≣ list ⊕ web resource ···· 1 _ 2
Name: * Social Engagement Dashboard
Section
Choose <b>Save</b> , and then choose <b>Close</b> .
(Remember to choose <b>Save</b> , or you'll lose your changes.)

### get a quick snapshot of trends

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Depending on your search topics, it only takes a moment to see updated data in your Social Engagement visuals.

To get a quick snapshot that shows how your search topics are trending each time you sign in, choose **Set as Default** (it's at the top of the screen, on the command bar).



 $\bigcirc$ 

### filter your visuals on the fly



#### **Filter options**

Depending on how your search topics are set up, you can choose the Filter button 🕥 and change the time frame, the languages, and the sources. This constructs the data set for the visual you are looking at and lets the visual adapt to your selection.

### from CRM to Social Engagement



# add a visual to an account form

For our next example, see how to add the Analytics summary to the account form.

Microsoft Dyna	mics CRM 🗮 Sales 🗸 Accoun	ts 🛛 🗸 🛛 Blue Yonder Airline 🗍 🗸			╚ ⊕
+ NEW 🐻 DEACTIV	ATE 🛛 🖞 CONNECT 🖾 👘 ADD TO MARKETING LIST	🚔 ASSIGN 🐃 EMAIL A LINK 🗙 DELETE			
Blue	Yonder Airlines (sam	nple) <sub>"≡</sub>			
Summary					
ACCOUNT INFORMATI	ON	Social Insights			ゆみ
Account Name *	Blue Yonder Airlines (sample)	DYNAMICS CRM			
Phone	555-0154				
Fax		Analytics summary			
Website	http://www.blueyonderairlines.com/				
Parent Account			7		
Ticker Symbol	-	798	406.1%		
ADDRESS		posts 114 per day <b>Buzz</b>	> average average 326 <b>Trend</b>	8.9 / -0.6 Sentiment	EN DE Languages
9068 Muir Road Los Angeles, KA 20593		Microsoft Social Engager	nent		



### go to accounts

You can add any of the visuals to the screen for your top accounts.

#### Тір

Depending on how your system is set up, you may also be able to use Social Engagement for contacts, leads, competitors, or other types of records.



If your screen looks like this (latest version):

On the nav bar, choose **Sales, Service, or Marketing > Accounts.** 



If your screen looks like this (older versions):

Choose Microsoft Dynamics CRM > Sales, Service, or Marketing > Accounts.

Microsoft Dynamics CRM	nl∽ nî	SALES 🗸	Dashboards   🗸			
My Work					Customers	
II ■ DASHBOARDS	WHAT'S N	EW	ACTIVITIES	×		×

#### select an account

Microsoft Dynamics CRM $\equiv$ sa	iles i 🗸 🕹 Acco	ounts   🗸		
🕂 NEW 📋 DELETE 🖙 🖘 EMAIL A LINK 👻 🕑 R	UN REPORT 🔻	EXPORT TO EXC	EL 👻 🐻 IMPORT DATA	* II CHART PANE * •••
➡ My Active Accounts				
✓ Account Name ↑	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_i@example.com
Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sample)	someone_c@example.com
Alpine Ski House (sample)	555-0157	Missoula	Paul Cannon (sample)	someone_h@example.com
Blue Yonder Airlines (sample)	555-0154	Los Angeles	Sidney Higa (sample)	someone_e@example.com
City Power & Light (sample)	555-0155	Redmond	Scott Konersmann (sample)	someone_f@example.com
Coho Winery (sample)	555-0159	Phoenix	Jim Glynn (sample)	someone_j@example.com
Contoso Pharmaceuticals (sample)	555-0156	Redmond	Robert Lyon (sample)	someone_g@example.com
Fabrikam, Inc. (sample)	555-0153	Lynnwood	Maria Campbell (sample)	someone_d@example.com
Fourth Coffee (sample)	555 0150	Renton	Yvonne McKay (sample)	someone_a@example.com
Litware, Inc. (sample)	555-0151	Dallas	Susanna Stubberod (samp	someone_b@example.com

Choose the account name.

In our example, we'll add the **Analytics Summary** to Blue Yonder Airlines, so that we're up on the latest social trends before we contact them.

### choose the link to start the wizard

Microsoft Dynamics CRM 🛛 💳 🛛 Sales 🖙 Accounts 🖓	Blue Yonder Airline 🛛 🗸	Next, we need to decide on
🕂 NEW 🛛 DEACTIVATE 🛛 📲 CONNECT 👻 📑 ADD TO MARKETING LIST 🛸 AS	SIGN 🐃 EMAIL A LINK 🗙 DELETE 🚥	the search topics to listen for on social networks for
Blue Yonder Airlines (sample	ē) .≡	this account.
Summary		Choose <b>Configure Social</b> Insights to start the wizard.
ACCOUNT INFORMATION	Social Insights	
Account Name* Blue Yonder Airlines (sample) Phone 555-0154 Fax	Configure Social Insights	(The link might be in a different location on your screen.)
Website http://www.blueyonderairlines.com/		I
Parent Account		
Ticker Symbol		

#### Тір

If you don't find the link at all, ask your system administrator to add the Social Insights component to the form.

## take advantage of pre-set search topics



To save time, a system administrator can set up lists of common search topics for your accounts in advance.

Everyone shares them and can select from the same lists. For our example, we'll take advantage of these lists, instead of setting up our own search topics.

Choose **Search topic**, and then choose **Next**.

#### Tip for advanced users

You can also set up your own search topics to listen for on social networks, if you want. There's <u>an example showing you how</u> in this eBook.

To make use of all options when you set up a search topic, we recommend that you choose the Advanced option and work directly in Social Engagement.

### select which topic to listen for

category       Pick a search topic       Create a new search topic       earch topics list       eme     Keywords       inter products     ink jet, laser printer, all-in-one, photo printer       ner cartridges     remanufactured cartridges, refill kits	Set up Socia	l Insights		?	×
earch topics list ame Keywords inter products ink jet, laser printer, all-in-one, photo printer ner cartridges remanufactured cartridges, refill kits	Set search topic type		Select visuals		
nter products ink jet, laser printer, all-in-one, photo printer ner cartridges remanufactured cartridges, refill kits	<ul> <li>Pick a search topic</li> <li>C</li> <li>Search topics list</li> </ul>	create a new search topic			
ner cartridges remanufactured cartridges, refill kits	Name	Keywords			_
	Printer products	ink jet, laser printer, all-in-one, photo printer			~
) Computer-aided Design (CAD) CAD software, wireframe, design modeling 🔨	Toner cartridges				
tter products flat bed plotter, drum plotter	3D Computer-aided Design (CAD)		<b>~</b>		
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### pick a visual

Set up Social	Insights		? ×	Because the visuals give a
Set search topic type	Set search topic or category	Select visuals		good overview of the results of the search, we'll pick the <b>Analytics summary</b> .
Add visual TOPIC NAM	E: 3D Computer-aided Design (	CAD)		Analytics summary.
Visual name	Description	Sample		
1 Analytics summary	Get a quick summary of the number of posts, how your sea		<u>ال</u> ، ×	
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				Finish.
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# know the scoop before you contact someone

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+ NEW 🐻 DEACT	IVATE 📲 CONNECT 👻 🕞 ADD TO MARKETING LIS	T 🍰 ASSIGN 📼 EMAIL A LINK 🗙 DELETE	•••			
Blue	" e Yonder Airlines (san	nple) -=				
Summary						
ACCOUNT INFORM	ATION	Social Insights				14 8
Account Name *	Blue Yonder Airlines (sample)					
Phone	555-0154	Analytics summary				
Fax			<b>→</b>			United States
Website	http://www.blueyonderairlines.com/					India
Parent Account		1,416 posts	47.1% > average			Germany United Kingdom
Ticker Symbol		202 per day Buzz	average average 1,006 Trend	9.4 / +0.3 Sentiment	EN RU DE ES FR Languages	Australia Locations
ADDRESS					-	

9068 Muir Road Los Angeles, KA 20593 Now you'll know that the buzz volume is really high compared to the average.

Something must be going on with your account – better find out before you call.

It's easy to do so! Choose one of the widgets to access the same data in Social Engagement. There, you can use powerful filters, read posts, and engage with others.

## Social Engagement visuals

This section gives you an example of each Social Engagement visual, and some ideas about how to use each one.





### get a summary of posts



#### **Analytics summary**

Get details about how many posts are showing up, and how the search topic or category you're interested in is trending.

You'll also see the sentiment that is being associated with your topic, the languages used to discuss your topic and the countries/regions found most often in this topic or category.

#### compare social sources



#### **Sources summary**

Compare where the posts are coming from. Quickly check sources like blogs, Facebook, Twitter, News, and videos.

Choose an area on the visual to see more details in Social Engagement.
# check the daily buzz



#### **Buzz report**

Check the buzz on your search topic or category. See the total number of posts and the average number of posts per week. (You can also choose a different time frame.)

The Buzz report helps you keep track of the volume of posts overall on all active sources for your search topics.

### see how the buzz is trending



#### **Trend report**

See how the number of posts is trending over time.

The Trend change compares the past five time frames (days, weeks, or months) to the most current time frame.

### see the post volume among sources



#### **Sources history**

See which sources the posts are coming from. Find out quickly if a specific source is creating significantly more buzz than others and requires in-depth investigation.

### compare where posts are coming from

Sources



#### **Sources Share of Voice**

See a visual that compares where the posts are coming from, and shows you which sources are the most active.

In this example, most of the posts are from Twitter, a significant number are from Blogs, while News, Videos, and Facebook posts are rarely found.

### compare the number of positive, negative, or neutral posts



See a visual that compares the positive, negative, or neutral posts in your search topics.

In this example, all posts are either positive or neutral, which results in a sentiment index of 10. This is an increase of +10 since last week.

# see the top 5 languages with the most posts



- en English
- de German
- fr French
- sp Spanish
- it Italian

#### Languages

See the top 5 languages with the most posts about your search topic or category.

At a glance, see which languages were used the most for posts about your search topics.

### see peaks and valleys in volume over time



### $\bigcirc$

### see when changes in sentiment occurred



#### **Sentiment history**

Correlate sentiment about the search topic with dates and events.

The black line indicates the sentiment index. The green line indicates the average sentiment index in your time frame.



### see how sentiment varies among sources

Sentiment summary by sources



Microsoft Social Engagement

#### Sentiment summary by sources

See how the sentiment varies among sources. Are posts on Facebook trending positive while Twitter is neutral?

In this example, most of the posts in the past week are on Twitter, and they're mostly positive.

# compare the number of positive and negative posts



### Sentiment volume

See a bar graph comparing the number of positive and negative posts.

This example shows the data by day, but you can also see weekly or monthly comparisons.

Choose the Filter button  $\bigcirc$  at the top of the visual to select a different time frame.

### read public posts

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7 =			
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#### **Recent posts**

See an excerpt of the 5 most recent posts. Drill in to Social Engagement to take action and respond to these posts.

# see key influencers



#### **Key influencers**

See which people are mentioning your search topics the most. You'll find details about the number of posts, the author's share of voice, and the trend change.

### More resources

### To find more information, visit: Social Engagement Help Center

### Quick links to more training resources:

- <u>Connect Dynamics CRM with Social</u> <u>Enagement</u>
- <u>eBook: Introducing Microsoft Social</u> <u>Engagement</u>
- <u>eBook: Set Up a Social Engagement</u> <u>Search for Your Product</u>
- <u>Video: Get started with Social</u> <u>Engagement (3:36)</u>
- <u>Video: Microsoft Social Engagement</u>
  <u>Overview (3:55)</u>
- <u>Video: Microsoft Social Engagement</u> <u>Analytics (7:23)</u>

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