

10 steps to Investor Relations Excellence using Social Media Intelligence

by **talkwalker** 

The paradigm shift that companies are undergoing at the hands of social media calls for change, and an increasing need for cutting-edge tech tools to adapt quickly and explore the possibilities presented by social media. Most professionals face certain obstacles when trying to keep pace with such changes and this guide aims to accompany those of you in need of concrete advice and relevant tutorials for implementing and understanding the uses of social media monitoring and analytics.

Discover the 5+5 steps for Monitoring and Analytics: five key steps in social media monitoring, and five factors to bear in mind as you drill down through social media data and discover new insights.

MONITORING

1. Define the topics that impact your Investor Relations (IR) strategy

First of all, monitoring your company name and all its components will give you an idea of the general sentiment towards your company, and your image in the eyes of the investment community. Then, don't forget to spot 'discussion starters', so you can take the opportunity to go out there and engage with your community (see examples in the list below).

Tip: Do not forget to monitor any common misspellings of your brand name!

Here is a list of **topics** we recommend for IR professionals:

- Company name
- Names of CEO and Management (national and international)
- Board of Directors
- PR spokespersons
- Key investors
- Cashtags (hashtags about your stock)
- Events, such as conferences, investor calls, and investor roadshows
- Annual reports, or quarterly results announcements
- Press releases/Corporate news
- Product Updates
- CSR campaigns
- Your own social media accounts, both at group level and at the branch level

For some names, setting up search queries can be very easy, but for other brands like *Apple*, noise needs to be reduced through the use of [Boolean operators](#) or **Filters**, which will be discussed later in this guide.

2. Find influencers that impact investors' opinion

To oversee the expansion of your target audience, identify new persons of interest who can become ambassadors for your brand on the web. These influencers actively share information and knowledge that can have an impact on your investor relations, and shape opinions among their network.

Rank	Influencers	Source Type	Number of Posts				Reach	Engagement
			Total ↻	Positive ↓	Neutral ↓	Negative ↓		
1	Reggie Rivas (@OnlineLeverage)	Twitter	57	0	57	0	325260	2
2	Darrel Nelson (@fxcmn)	Twitter	52	0	52	0	253864	0
3	Claudia Daryl Robert (@onlinereward)	Twitter	51	0	51	0	309364	1
4	Sallie Moss (@CleverSallie)	Twitter	50	0	50	0	324486	1
5	Tina Milan (@OnlineLuxury)	Twitter	50	0	50	0	289299	0
6	Gladys Elliott (@direct4x)	Twitter	50	0	50	0	303513	1
7	Elinor Decker (@RevenueOnline)	Twitter	46	0	46	0	326621	0
8	Julia Solonik (@SolonikJ)	Twitter	35	0	35	0	477240	2
9	VC + E = IPO™ (@VCEIPO)	Twitter	21	4	15	2	48698	0
10	AtomsToBits (@atoms2bits)	Twitter	12	1	10	1	15957	2

This table shows a top 10 of Twitter influencers based on how much they talk about your brand and how big their followership is.

Influencers can be closely followed and ranked by number of posts and reach. Those with the largest reach, or those initiating the highest level of engagement should be your first port of call.

The usual suspects:

- Investor bloggers
- Financial journalists, bloggers
- NGOs
- Activists

Tip: Bear in mind the 20/80 rule: 20% of the contributors can shape 80% of opinion about IR.

3. Define listening panels of your main IR influencing sources

After identifying these persons and sources of interest, think of all other stakeholders who could potentially have an impact on your reputation, and create a specific panel where you will be able to follow all their publications:

- Analysts, research boutiques, investment banks, investment companies
- Industry journalists or bloggers, Financial journalists or bloggers
- Journalists and bloggers that are particularly supportive or critical
- News agencies, industry-specific press, financial press

- Specialized forums like *Wikinvest*, *StockTwits*, *The Motley Fool*, *Seeking Alpha*
- Industry associations
- Regulators
- Major current investors
- NGO's, activists
- Company's and affiliates own social media accounts

The next step is to carefully categorize them by the nature of their activity (e.g. investors, activists, supporters, critics, company's own social media accounts, and competitors).

Tip: Consider all media types: journalistic coverage can arise from and get distributed to news agencies, clients, journalists' personal blogs or Twitter accounts, and press Twitter accounts.

Your provider of social media analytics should offer **Page Monitoring**, so you are able to closely follow everything that is published on those pages, even if the page does not include the particular topic or keyword you have pre-defined. This means all data published on the pages will be delivered to you and lets you discover topics that were not yet on your radar (e.g. a call for opinion on a certain topic by a regulator).

These monitoring efforts will enable you to better control and steer both your regular and crisis communications.

4. Create customized alerts that will flag up any relevant publications quickly and thoroughly

Setting up **Alerts** is a great way to establish a solid early warning system, which can be the starting point of identifying potential threats to your reputation and business, and ultimately enable you to react on time as new IR-related topics or issues emerge.

Alert subscription

Alert name Enter a name for the alert. The name is useful to differentiate between alerts

Alert recipients Email addresses of the recipients of the alert. Multiple addresses can be separated by a comma

Alert format Format of the content of the alert

 Max number of results in the alert

Trigger type Type of trigger used to generate the alert

Trigger Send alert when at least
 new result(s) found

Create Alert

Alerts should be fully customizable in terms of:

→ **Format:** can come as an email or can be added as a feed to your RSS reader

→ **Frequency:** can be configured according to what works best for you and the given situation. For example:

- Instant notifications on all new publications
- Only when the volume of mentions exceeds the average flow by a certain percentage
- According to the number of publications
- A certain number of times a day

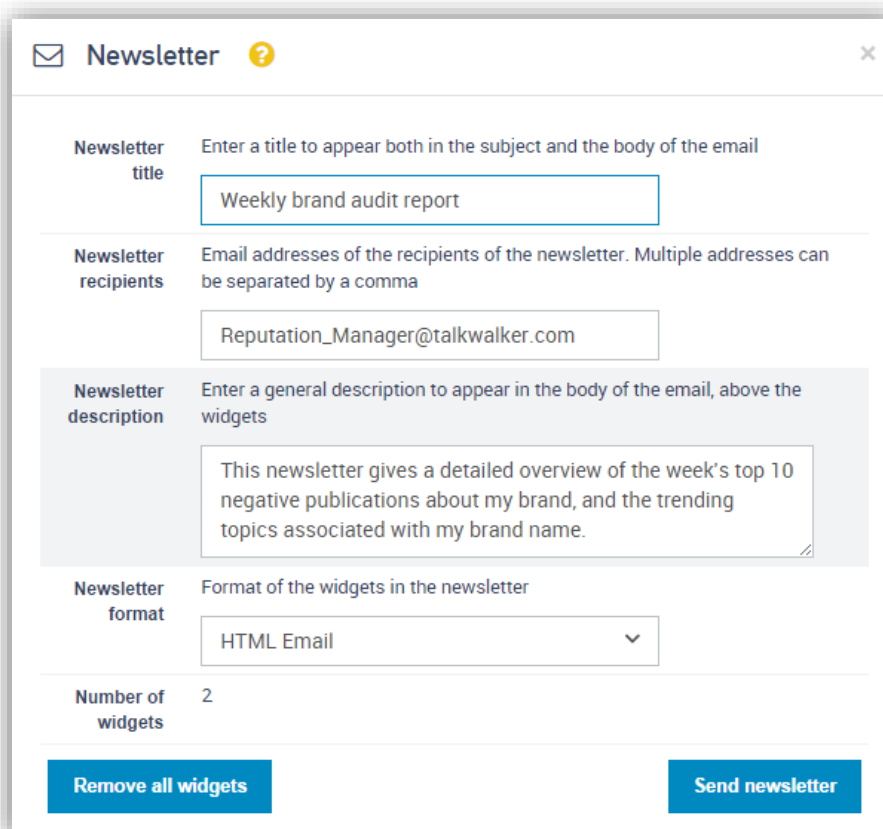
→ **Source:** alerts can focus on the publications of specific panels you have created which monitor influential sources.

Filters are also a great way to cut the volume of notifications down to include only sensitive topics. For this, you can use [pre-defined filters](#) offered by the tool, or create your own based on a group of keywords concerning your stock, your equity, any underperformance, valuations, dividends, mis-selling and/or any information relevant to compliance and audit. This will help you to react quickly each time a new IR topic or issue emerges.

5. Automate the creation of relevant reports and distribute to relevant teams

Once you've identified the themes that interest you, set up **newsletters** with detailed reports on the current status and striking findings. Include insights on volume, sentiment and topics of discussion, and customize your reporting to fit the specific interests and needs of your recipients. Main recipients can be:

- Office of the CEO
- CFO
- International and local entities
- Investor roadshow organizers
- Compliance, Audit, and Legal units
- Public Relations



The screenshot shows a 'Newsletter' configuration window. It includes fields for the newsletter title, recipients' email addresses, a description, the format (HTML Email), and the number of widgets (2). There are buttons for 'Remove all widgets' and 'Send newsletter'.

Field	Description	Value
Newsletter title	Enter a title to appear both in the subject and the body of the email	Weekly brand audit report
Newsletter recipients	Email addresses of the recipients of the newsletter. Multiple addresses can be separated by a comma	Reputation_Manager@talkwalker.com
Newsletter description	Enter a general description to appear in the body of the email, above the widgets	This newsletter gives a detailed overview of the week's top 10 negative publications about my brand, and the trending topics associated with my brand name.
Newsletter format	Format of the widgets in the newsletter	HTML Email
Number of widgets		2

Buttons: Remove all widgets, Send newsletter

Tip: Consider social media as a key channel from which you can gather the timeliest reactions from the investment community.

ANALYTICS

6. Analyse key trending topics and messages discussed by your target audience

Discussions flow constantly about topics that may impact your company and investor relations. Analyse clouds of trending topics to understand the emotions of your audience regarding your events and communications, detect any upcoming issues or negativity, understand the tone of discussions about your company and the main topics discussed about a particular event



Trending Topics

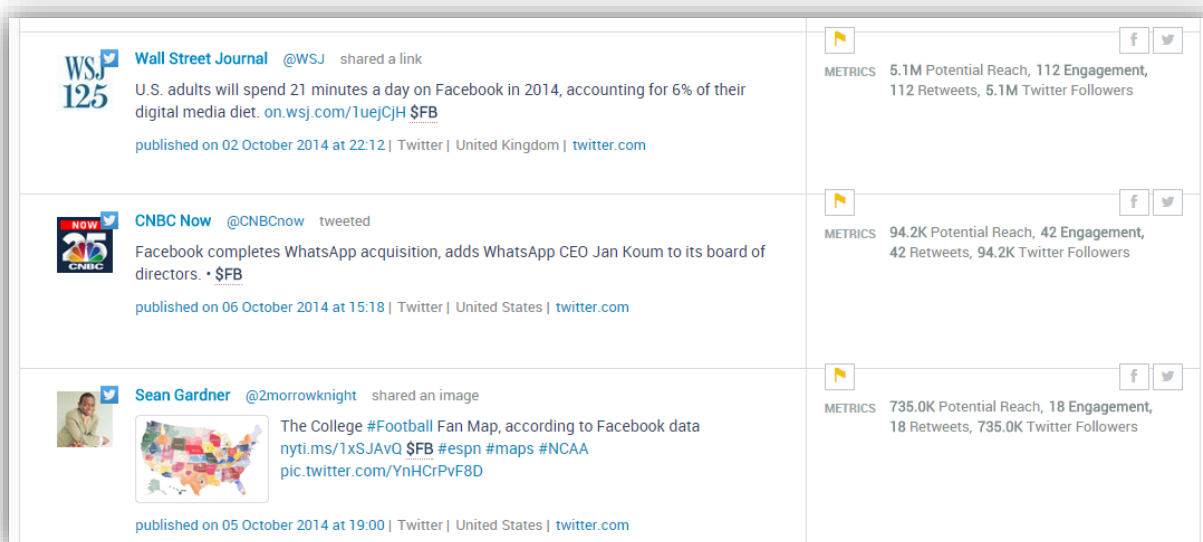


Trending hashtags only

Such tools are also useful in assessing the level of message penetration, or message misalignment. Message misalignments include misquotes, misunderstanding of your message and can be dealt with by actively responding to inaccuracies. Depending on the scope of misalignment, your IR team, PR team, CEO or CFO can provide rectification immediately or at some point in the future.

7. Gather social media intelligence on your stock behaviour

Stock prices are the result of a multitude of volatile factors ranging from price history, dividends, and other financial indicators, to the general feeling of the public towards your company, your product, and your industry in general. There are two approaches to understanding public opinion about your stock. First, catch all online publications mentioning your company name(s) and the word 'stock'. Second, include your *cashtag* into your analytics framework. A cashtag is a unique, standardized hashtag for a specific stock, consisting of the \$ sign followed by the listed company's ticker symbol.



Some results about Facebook's cashtag (\$FB)

Analyse the volume and sentiment of discussions and mentions of your stock, and benchmark these metrics with previous major events. Looking at the broader picture over time will also give you insights on long term tendencies of discussed topics and opinions, and ultimately patterns which could potentially impact your stock valuation.

Cashtags allow IR professionals to have a rapid snapshot of the discussions of the investment community on Twitter.

8. Always focus on influencers who affect investor opinion in your analytics and actions

The importance of creating influencer panels (see point 3) lies in the fact that you are able to create a clear picture of their online behaviour and work at any time.

Be sure to regularly assess their performance, with metrics such as:

- Their 'passion' and level of activity
- The reach of their communication efforts
- Their level of engagement with the audience
- The growth of referral traffic from their owned media channels to yours

Gathering insights like their current topics of interest and levels of influence will help you craft a plan of action to decide on which tailored approach (proactive and reactive) to adopt for each influencer.

Any thorough social media analysis for Investor Relations must focus on the influencers that matter to your brand, and who will ultimately have an impact on stock valuation.

9. Conduct competitive research and benchmark

Understanding competition is crucial, so compare the IR topics that your competitors discuss and use to gain attention. By carefully looking at the response from their audience, you may be able to determine the strengths and weaknesses of your competitors and craft strategies accordingly.

Reputational competitive research has two facets: owned, and earned media. Owned media is easily compared using the **Page Monitoring** functionality mentioned earlier in point 3. This provides insight on which company has the larger reach, stronger engagement, faster growth of social media pages, and larger share of positive sentiment. Earned media delivers information about your respective volume of mentions across the web, engagement, and reach, but also sentiment, geography, and cashtag performance.

Benchmarking with competitors will give you invaluable knowledge, help in setting up sensible benchmark schemes and help you to learn from the successes and failures of your industry peers.

10. Assess the performance of your events and campaigns with specific IR metrics and KPIs

Investor Relations KPIs can be tailored for earnings reporting, and capital measures such as bond issuance, capital increases, acquisitions, or new quotations on the stock exchange.

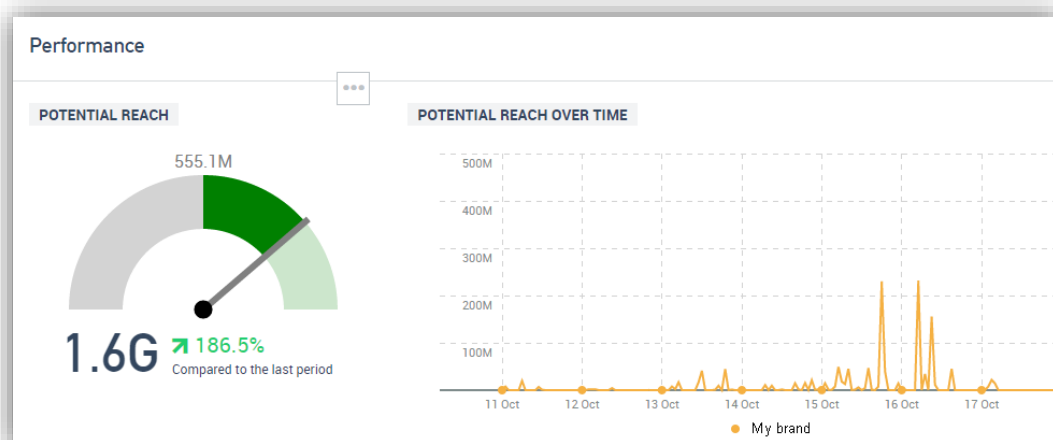
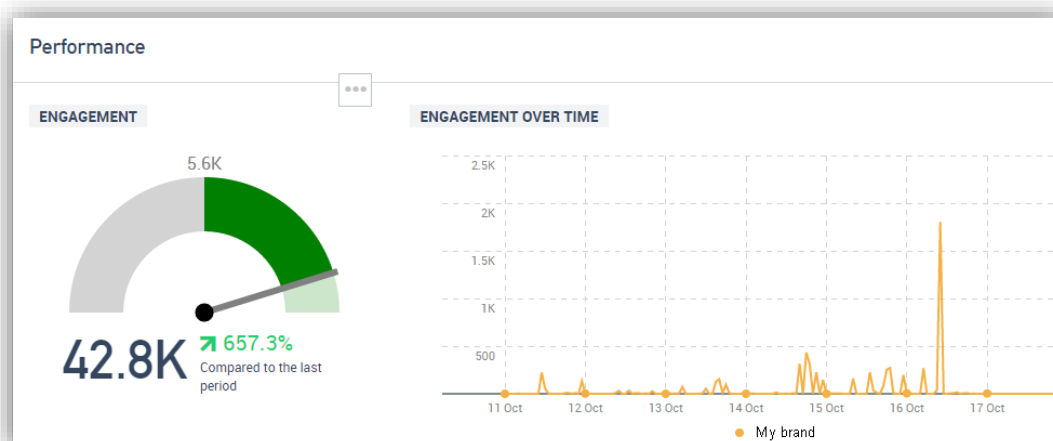
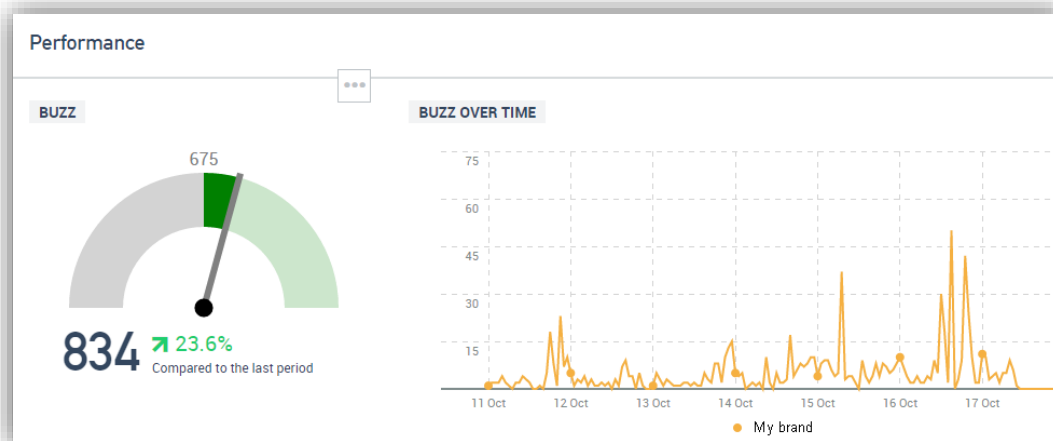
The major metrics that demonstrate the impact on social media of your communication campaigns are:

- conversation volume
- sentiment (positive, negative or neutral) towards your name and your activity
- engagement rate with the audience (which includes all activity on social media such as replies, retweets, shares, likes and favourites)
- reach of your publications and messages

→ efficiency of the identified influencers in their discussions about your company.

Tip: Tracking the performance of the hashtag you've used for your communication will also give great insights on the engagement rate of your community.

These elements account for the overall 'virality' of your campaigns.



The barometers above deliver insights about the levels of buzz, engagement and potential reach over a certain period, and in comparison to the previous period.

Furthermore, do ground work for future actions. Did you detect any topics of concern? Did you identify particular strengths you should exploit later on? It is of paramount importance to establish a measurement and benchmarking policy that learns from past experiences, and to then set goals for major IR events to encourage continuous improvement.

CONCLUSION

Social media intelligence can play a key role in your company's IR strategy and help to manage your financial reputation and understand your stock valuation. The 5+5 steps of Social Media Monitoring and Analytics empower you with actionable insights to detect the main issues to be addressed, to create the correct messages to be communicated, to identify the right influencers to work with to amplify your company brand, and finally, to implement the relevant KPIs to measure and track your results to improve your performance.

**Get in touch with us if you wish to apply these tips
for your business too! contact@talkwalker.com**

