

Introducing Microsoft Social Engagement

See how social media listening and engagement can help your business



Social landscape

In a socially connected world, engagement with your customers can happen anywhere or anytime.

Microsoft Social Engagement puts powerful social tools in the hands of your sales, marketing, and service teams — helping them gain insight into how people feel about your business and proactively connect on social media with customers.



Social for everyone

Anyone can benefit from using Social Engagement, but some of the use cases include:

- If you are in **Sales**, you may want to keep track of your key accounts and competitors.
- If you are in **Marketing**, you may want to track your brand, see who your key influencers are, or monitor the social impact of a particular campaign.
- If you are in **Service**, keeping customers happy is important. You can listen for when customers are unhappy on social channels and be proactive about responding.



Introducing Microsoft Social Engagement

Microsoft Social Engagement provides the following capabilities:

- **Social listening:** Listen in 19 languages across five sources – Facebook*, Twitter, Blog, Video, and News.
- **Social analytics:** Experience rich data visualizations, such as sentiment analysis, phrase clouds, top fans, top critics, and top hashtags.
- **Social engagement:** Build deeper relationships with customers by empowering teams across sales, marketing, and service to engage with their social communities on Twitter and Facebook.
- **Social CRM:** Fully contextual and integrated across sales, marketing and service. See social insights from within Microsoft Dynamics CRM or Microsoft Dynamics Marketing.



* Effective May 1, 2015, Facebook will no longer be supporting their API, which allows us to perform keyword searches for public Facebook posts. You can continue to gather posts and comments from specific Facebook pages by adding Facebook page rules to your search topics.



Social Engagement Overview

When you sign in, you will immediately see our new dashboards, making it easier for you to analyze your data. Social Engagement provides a highly interactive experience with visual filtering on all widgets. For example, clicking negative sentiment adds it to the filters and all the widgets are immediately updated to show only for posts with negative sentiment.

Dashboard
Select dashboard you want to view.

Search Topic
Define search topic set-up.

Filters
Set filters; the dashboard will be updated accordingly.

Timeframe
Select the time frame.

Trend
See volume of posts and trend of the current data set – comparing to last 5 timeframes.

Analysis Focus
Filter by search topic or category.

Widgets
These widgets are displayed dynamically, whereas the other widgets are always shown.

Posts
Navigate easily to the post view from any dashboard.

The dashboard displays the following data for Dynamics CRM:

- SENTIMENT:** 7.6 Index (positive), 1.3 change (negative)
- VOLUME:** Line chart showing volume and average over time (10 Mar to 16)
- PHRASES:** #conv15, crm, #msdynamics, Microsoft, MSFT, #msdyncrm, Intergration, sales, #msdyncomm, Bing, Subscription, ebook
- SEARCH TOPICS:** CRM Dynamics (16.92% of posts in the category, 16.25% of posts in your data set)
- AUTHORS BY SOURCE:** 2211 authors total (1994 from Twitter, 125 from LinkedIn, 80 from Facebook, 7 from YouTube, 5 from Instagram)
- SOURCES:** Twitter (4,839), LinkedIn (212), Facebook (126), YouTube (29), Instagram (9)
- AUTHORS:** Diane Prescott (232), Annie Herriman (164), Lori Penor (106), Justin Harrison (78), Kim Akers (35)
- LANGUAGES:** English (3899), German (397), French (388), Italian (246), Spanish (184)



Section Navigation

You can use the section navigation to access the areas of the application.

Analytics

Find dashboards for: overview, conversations, sentiment, location, and sources.

Social Center

Engage with social communities on Facebook and Twitter.

Message Center

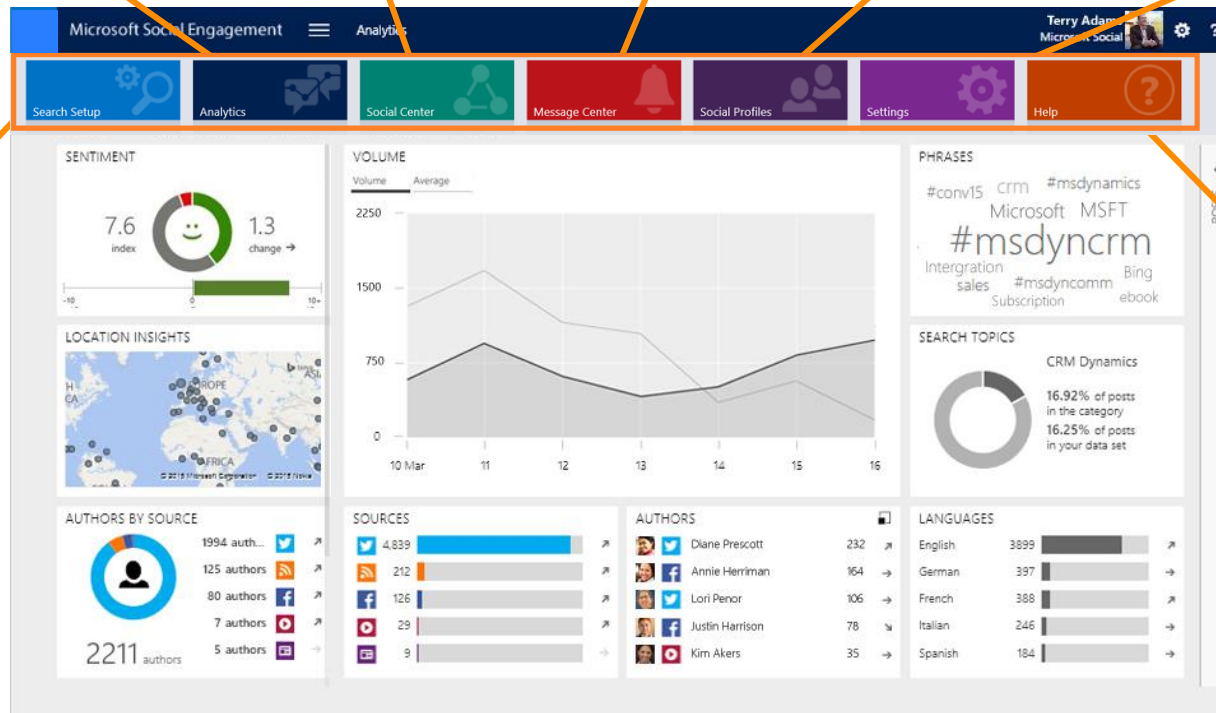
Create or modify alerts.

Social Profiles

Manage your authenticated Twitter and Facebook profiles to use in Social Center.

Settings

Access the area to set preferences and other admin settings.



Search Setup

Create and manage search topics.

Help

Access [Social Engagement Help Center](#).



Analytics: Overview

Get a first insight into what people are talking about including volume trends.

Sentiment

Shows how people feel about the topics you set up.

Location Insights

Analyzes where posts are coming from around the world.

Authors by Source

Shows you the number of authors by source.

Sources

Shows which sources are driving the most discussions and also the trend value.

Volume

Visualizes the number of posts over time.

Authors

See who mentions your search topics the most. Expand to the full view with additional details.

Phrases

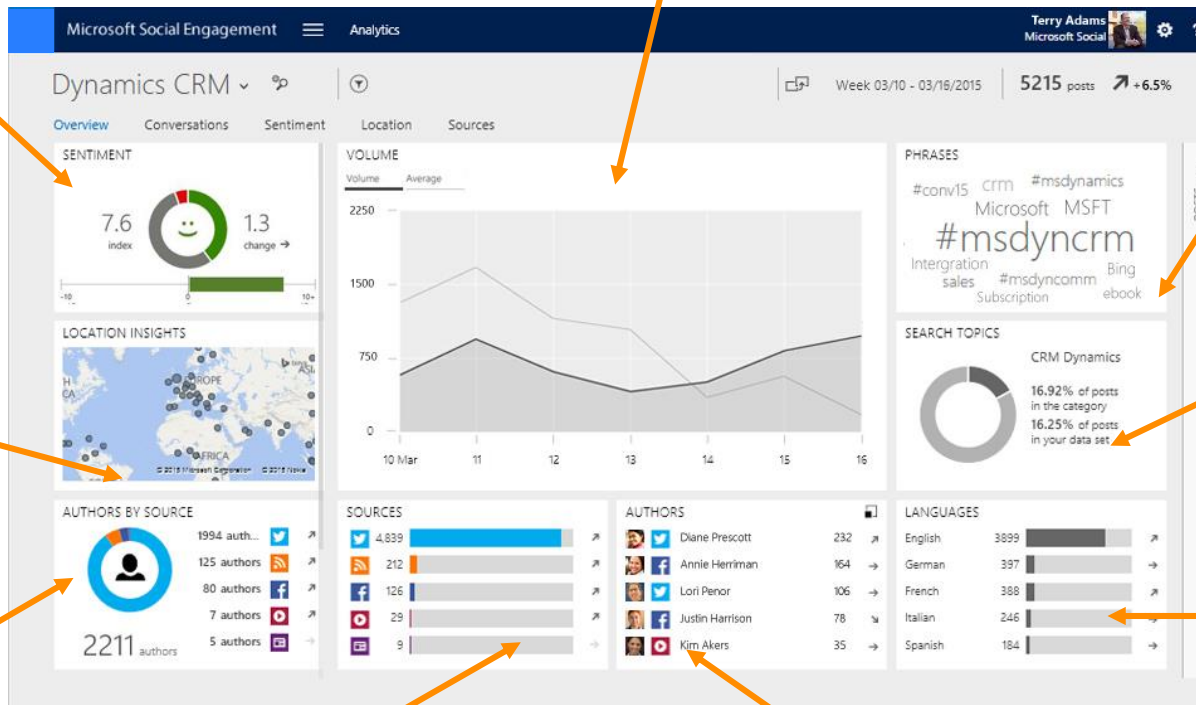
See the top phrases within your data set. Results are based on significance, not only on volume.

Search Topics

See the breakdown by volume of the top five categories. Choose any category to see the top five topics within that category.

Languages

See the top five languages of your posts.



Analytics: Conversations

Find out what people are talking about. You can get insight into the most relevant and trending phrases.

Phrases

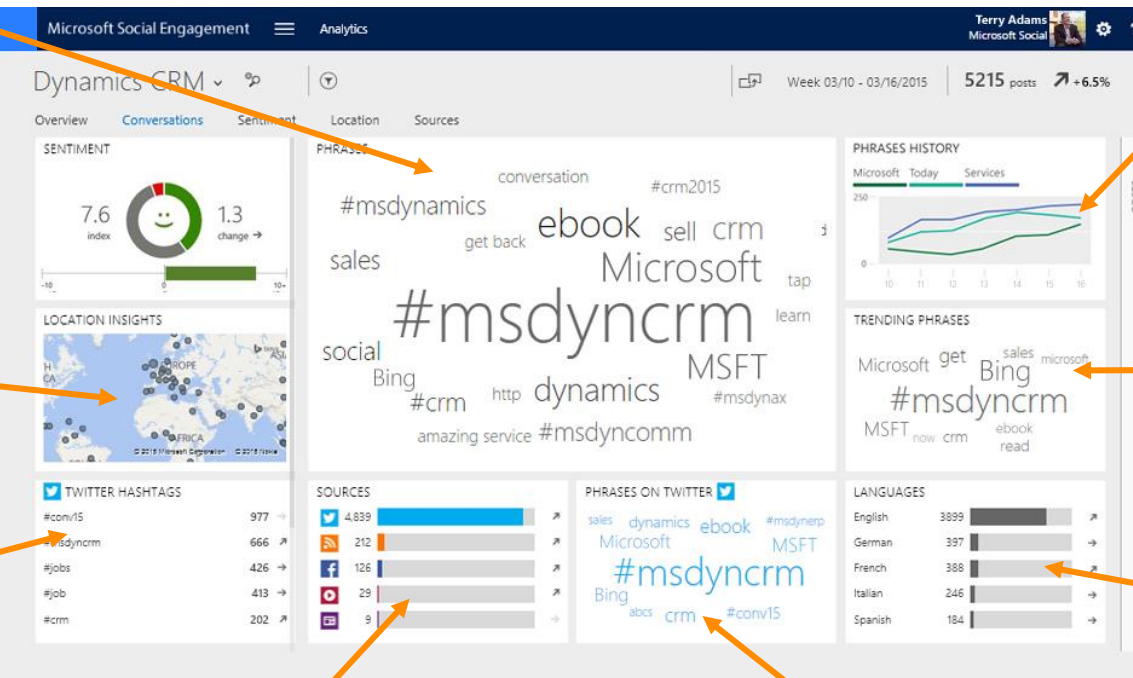
See the top phrases within your data set. Results are based on significance, not only on volume.

Location Insights

Analyzes where posts are coming from around the world.

Twitter Hashtags

Shows you the top five hashtags in your data set.



Sources

Shows which sources are driving the most discussions and also their trend value.

Phrases on Twitter

Shows the top phrases on the top source in your data set.

Phrases History

Shows you the volume of posts containing the three top phrases.

Trending Phrases

Shows you the phrases that are trending right now, compared to posts in the past.

Languages

See the top five languages of your posts.



Analytics: Sentiment

Get an understanding of how people are feeling towards your brand, products, services or even competitors.

Location Insights

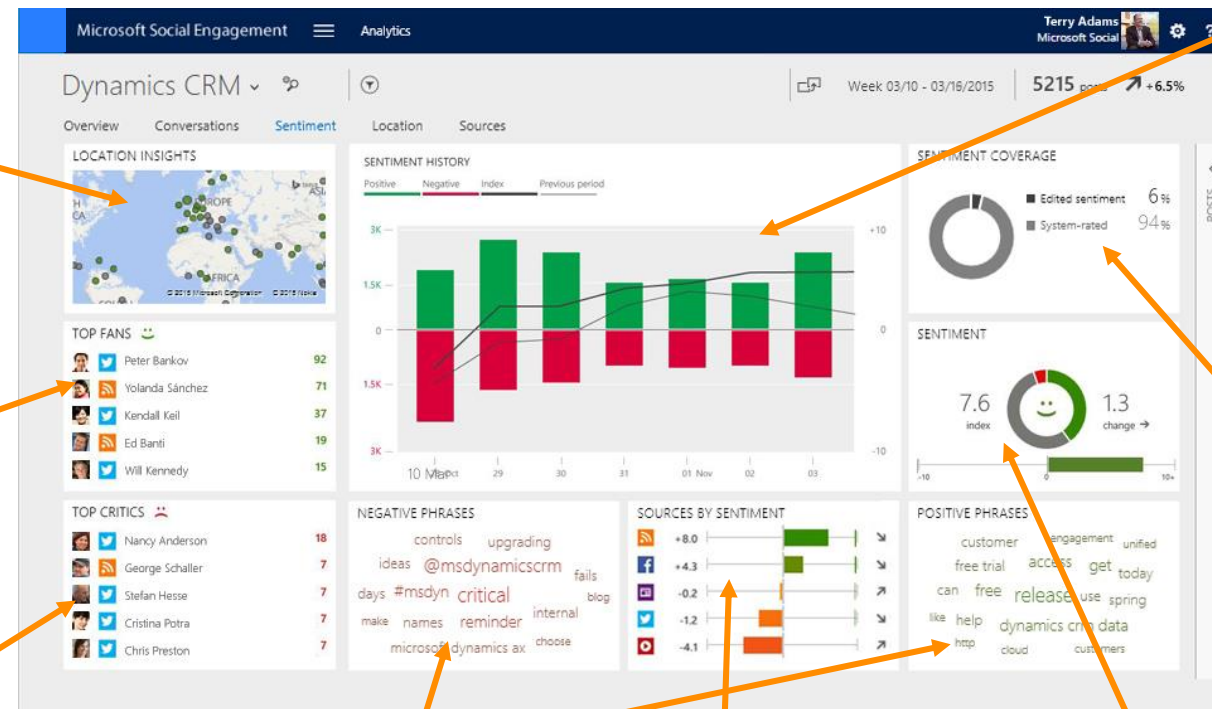
Analyzes where posts are coming from around the world.

Top Fans

See who spoke positively about you.

Top Critics

See who spoke negatively about you.



Negative Phrases/Positive Phrases

See the phrases most often found in negative and positive posts.

Sources by Sentiment

Shows you how the sentiment about your topic varies among sources.

Sentiment

Shows how people feel about the posts you analyze.

Sentiment History

Shows the sentiment history for our time frame. Looks like our sentiment is improving through the week and generally we are doing better than our average index.

Sentiment Coverage

Shows you the edited % vs. the system %. You can override the sentiment value to fine-tune the analysis.

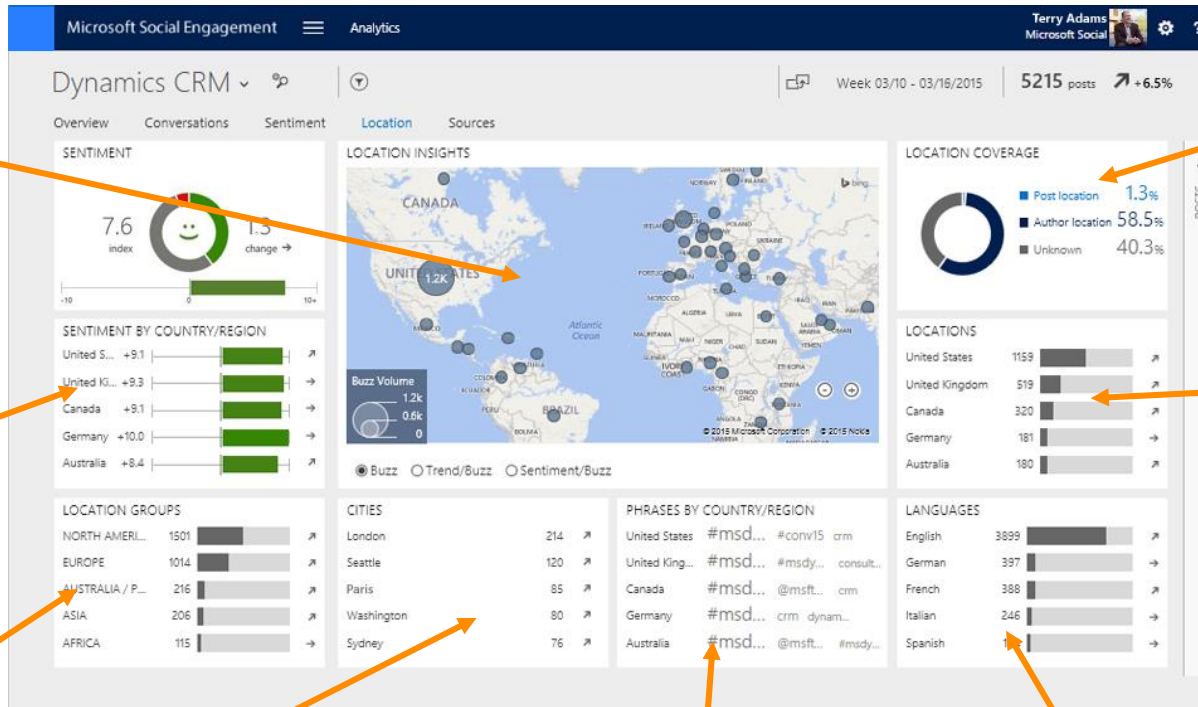


Analytics: Location

Find out where posts are coming from and how your topics are perceived around the world.

Location Insights

Analyzes where posts are coming from around the world.



Location Coverage

Shows you the relative distribution of posts with, and without, location data.

Locations

Shows you by country/regions where posts are coming from.

Sentiment by Country/Region

Shows you the sentiment in the top countries/regions.

Location Groups

Shows the groups of countries/regions you define.

Cities

Shows the most often found cities from the posts in your data set.

Phrases by Country/Region

Shows you the most often found phrases in the most active countries/regions.

Languages

Shows the top five languages of your posts.



Analytics: Sources

Get insight about which sources are driving the most discussions across sources.

Sources by Sentiment

Shows you how people's feelings about your topic vary among sources.

Location Insights

Analyzes where posts are coming from around the world.

Authors by Source

Shows you the number of authors by source.

Sources

Shows which sources are driving the most discussions and also their trend value.

Sources History

See how the post volume within the available sources evolved over time.

Activities

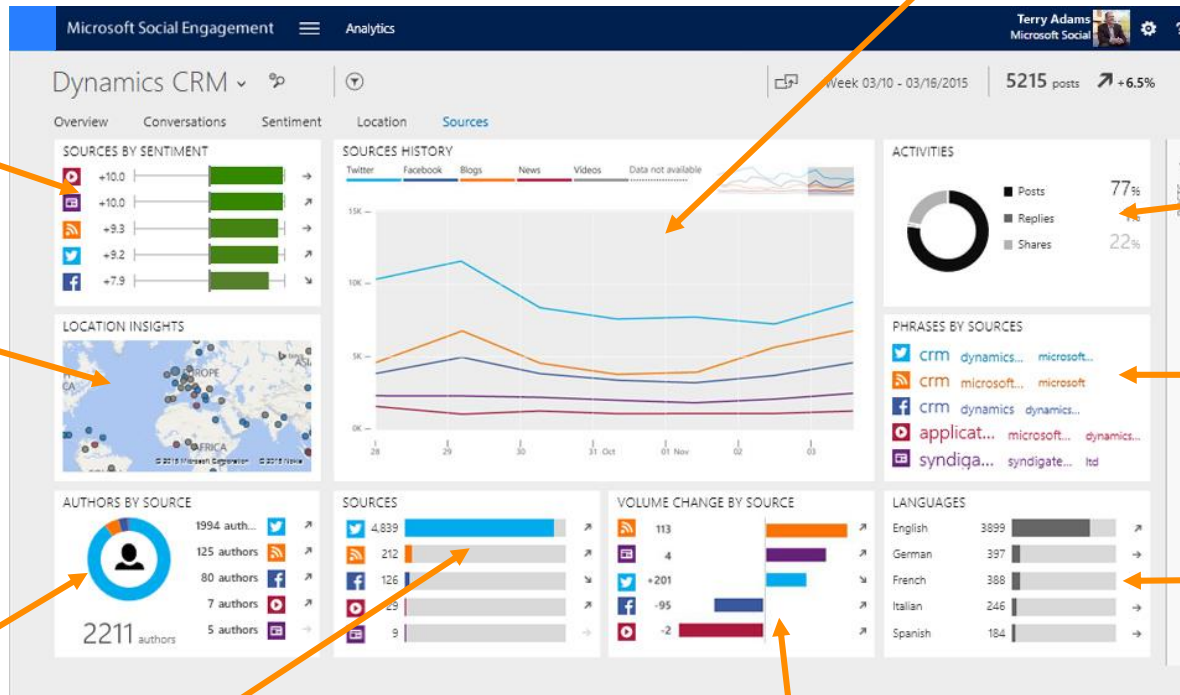
See the types of posts in your data set.

Phrases by Sources

See most often found phrases by source.

Languages

See the top five languages of your posts.



Posts

Easily navigate to posts with one click from any of the analytics pages. Here, you can see the full post and take internal and external actions on the posts as highlighted below.

Post Details

If you click the post, you can see a bigger view of the post on the right pane.

The screenshot displays the Microsoft Social Engagement interface. The top navigation bar includes 'Microsoft Social Engagement' and 'Analytics'. The main header shows 'Dynamics CRM' and a date range of 'Week 03/10 - 03/16/2015' with '5215 posts' and a '+6.5%' change. Below the header are tabs for 'Overview', 'Conversations', 'Sentiment', 'Location', and 'Sources'. The main content area is divided into two panes. The left pane, titled 'POSTS', shows a list of posts with columns for 'SELECT ALL', 'ASSIGN', and 'REMOVE'. The right pane shows a detailed view of a post by Ed Banti, including the post text, a video player, and interaction options like 'LIKE', 'COMMENT', and 'SHARE'. An orange arrow points from the 'Ed Banti' post in the list to the detailed view on the right. Another orange arrow points from the 'SHARE' button in the detailed view to the 'External Actions' text below.

Internal Actions

Assign posts to a user or apply a label.

External Actions

Reply, Retweet, Favorite and Direct Message on Twitter. Like, Comment, Share, and Private Message on Facebook.



Social Center

Enable your community manager or your customer service team to engage with fans and critics alike or address customer issues before escalations. Social Center consists of user-configurable and shareable streams that display posts based on specific sources and filters we define.

Rearrange

Easily change the order of the streams by dragging and dropping.

Scroll Arrows

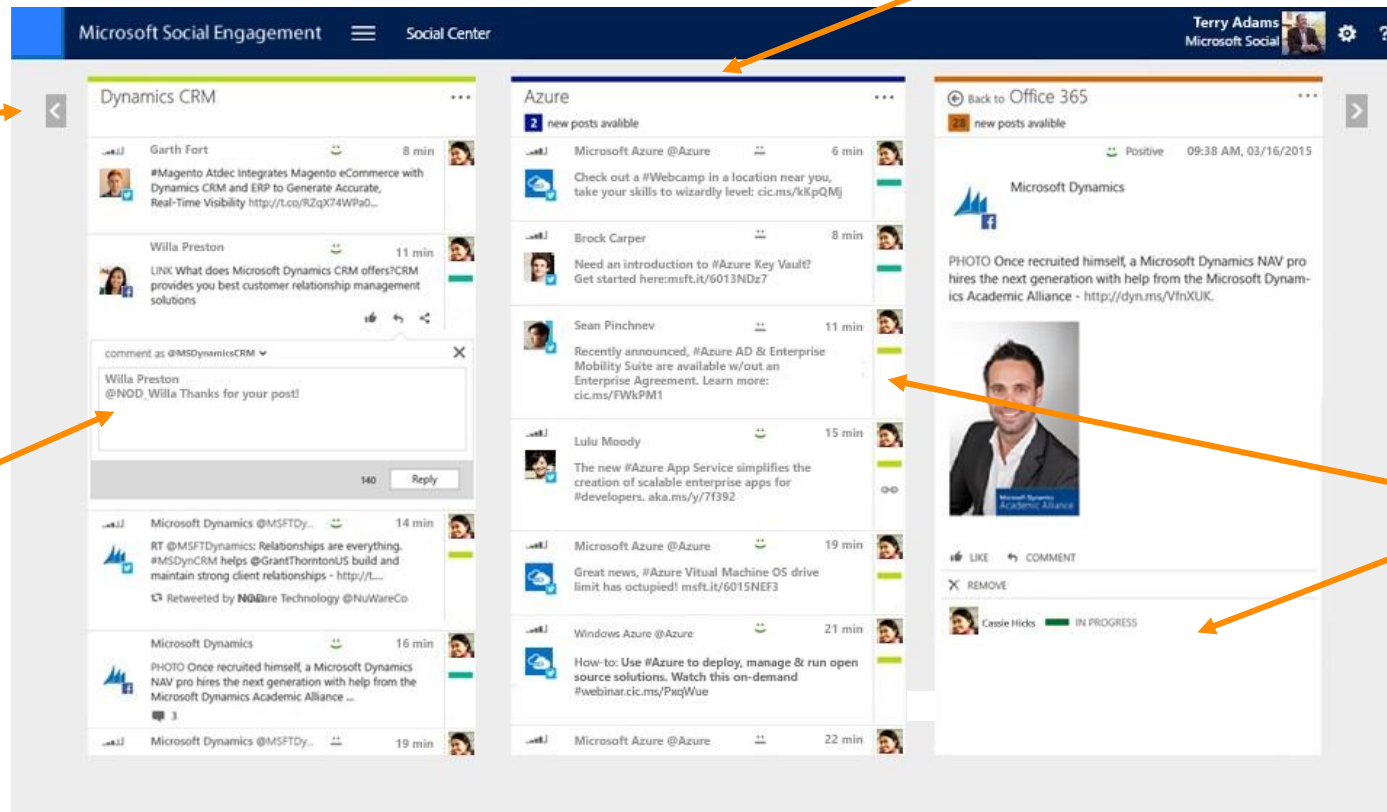
Use arrows to scroll through streams.

Reply

Here is an example of replying to a tweet.

Internal and External Actions

Similar to the Post view, you have the same internal and external actions.



Message Center

Trend alerts let you spot emerging trends and let you know when things worth knowing happen. Post alerts enable you to get informed if a new post matching your defined filters is found. The Message Center lets you manage all your alerts in one place.

The screenshot displays the Microsoft Social Engagement Message Center interface. The top navigation bar includes 'Microsoft Social Engagement', 'Analytics', and a user profile for 'Terry Adams Microsoft Social'. The main content area is divided into two panels. The left panel, titled 'ALERTS', lists four alerts: 'Dynamics CRM Sentiment cha...' (Post Alert), 'Dynamics CRM Volume spike alert' (Post Alert), 'Surface Pro' (Trend Alert), and 'XBox One'. The right panel, titled 'ALERT DETAILS', shows the configuration for 'My active alert'. It includes a 'Status' dropdown set to 'Active', an 'Alert Type' dropdown set to 'Post Alert', and a 'No Duplicates' checkbox. The 'Recipients' section shows three email addresses: 'Adrian@adventure-works.com', 'Forrest@consolidatedmessenger.com', and 'gabriele@fourthcoffee.com'. The 'Data Sources' section lists 'Dynamics CRM' and '2 Filters'. Action buttons for 'SAVE', 'VIEW IN ANALYTICS', and 'CANCEL' are located at the top right of the details panel.



Social Profiles

You can add your authenticated Facebook and Twitter accounts to respond to posts within Microsoft Social Engagement. This also allows you to acquire private messages from your authenticated accounts.

Microsoft Social Engagement Social Profiles Terry Adams Microsoft Social

Add and manage social profiles that you either own or were shared with you.

⊕ ADD SOCIAL PROFILE 🔁 CHECK TOKENS

Owned Profiles

Type	Name
Twitter profile	

Shared profiles

We couldn't find a social profile to show here.

Add social profile

Select the type of social profile you want to authenticate and add to your user account.

- Facebook User
- Facebook Page
- Twitter Account

Add

Add a Social Profile
Use this control to add a social profile.

Share Profile
You can share social profiles with other Social Engagement users, enabling them to take actions on posts on behalf of the shared profile.

Add a Social Profile
Choose a social profile and enter your credentials.



Search Topic Set-up

Create Categories

Select this control to add new categories.

List of Search Topics

Shows you the search topics in a particular category.

Estimated Quota

Estimates the expected post volume and whether or not it is within your post quota*.

Microsoft Social Engagement Search Setup

Summary Blocked Content

Accounts

CATEGORIES	
Category	Search Topics
All Categories	15
Accounts	5
Competitors	1
Facebook Pages	4
Products	3
Uncategorized	0

SEARCH TOPICS					
Search Topic	Searches	Twitter	Facebook	Messages rules	Posts
CRM Dynamics	1	1	1		3431
Office 365	1	1	1		54020
Yammer	1		1		5151

QUOTA

150k
100k
50k
0k

2, Mar 16, Mar 23, Mar 30, Mar

— Limit — All Categories — Accounts

Expected to exceed limits:
Your solution is expected to exceed the post quota. Edit search topics to reduce the number of posts, or you can purchase additional post quota in the Office 365 admin center.

Quota types	Posts
Monthly post quota	110,000
Current number of posts	69,044
Expected number of posts	89,182

*Not shown here: You can see a preview of expected Tweets, so that you can refine your search rules as needed.



More resources

To find more information, visit:
[Social Engagement Help Center](#).

Quick links to more training resources:

- [Social Engagement Help & Training](#)
- [More videos and eBooks](#)
- [Social Engagement Forum](#)

If the provided resources don't answer your questions, your administrator can contact [product support](#).

The screenshot shows the Microsoft Social Engagement Help Center interface. At the top, there is a dark blue header with the Microsoft logo and the text "Social Engagement Help Center". To the right of the header is a search bar labeled "Search Help & Communities". Below the header is a main content area. On the left, there is a large image of three people (two men and one woman) sitting around a table, looking at laptops. Overlaid on this image is a dark grey box with the text "Help & Training" and a white right-pointing arrow icon. To the right of the main image are two dark green rectangular buttons. The top button has a white network icon and the text "Videos & eBooks". The bottom button has a white speech bubble icon and the text "Social Engagement Forum". At the bottom of the page, there is a white navigation bar with three icons: a video camera icon labeled "Videos", a group of three people icon labeled "Community", and a wrench icon labeled "Support".



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Version 2.0





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