



## Evaluation and decision-making in social media marketing

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### Abstract

**Purpose** - As organisations are increasing their investment in social media marketing (SMM), evaluation of such techniques is becoming increasingly important. This research seeks to contribute to knowledge regarding SMM strategy by developing a stage model of SMM evaluation and uncovering the challenges in this process.

**Design/methodology/approach** – Interviews were conducted with eighteen key informants working for specialist SMM agencies. Such informants are a particularly rich source, since they manage social media campaigns for a wide range of clients. An exploratory research was conducted and thematic analysis surfaced the key components of the SMM evaluation process and associated challenges.

**Findings** – The Social Media Marketing Evaluation Framework is developed. This Framework has the following six stages: setting evaluation objectives, identifying KPI's, identifying metrics, data collection and analysis, report generation, and management decision making. Challenges associated with each stage of the Framework are identified, and discussed with a view to better understanding decision-making associated with social media strategies. Two key challenges are the agency-client relationship and the available social analytical tools.

**Originality/value** – Despite an increasing body of research on social media objectives, KPI's and metrics, no previous study has explored how these components are embedded in a marketing campaign planning process. The article also offers insights in the factors that make SMM evaluation complex and challenging. Recommendations for further research and practice are offered.

**Keywords:** Social Media Marketing; Social Media Marketing Evaluation; Digital Marketing; Agency-Client Relationship; Social Media Analytics.

**Article Type - Research paper**

## Introduction

Due to its dynamic and emergent nature, the effectiveness of social media as a marketing communications channel has presented many challenges for marketers. It is considered to be different to traditional marketing channels, and even other digital marketing channels, centring around a two-way conversation or exchange (Bacile, Ye and Swilley, 2014; Shih, 2009). Many organisations are investing in their social media presence because they appreciate the need to engage in existing social media conversations in order to protect their corporate or brand reputation (Lee and Youn, 2009), increase customer engagement (Gummerus, Liljander, Weman and Philstrom, 2012) or increase online sales (Tsimonis and Dimitriadis, 2014). As organisations increasingly develop their social media presence, it is vital to be able to evaluate the impact of this investment, including its contribution to achieving marketing objectives, as well as more generally understanding any return-on-investment (ROI) (Pang and Lee, 2008; Fisher, 2009; Kumar and Mirchandani, 2012; McCann and Barlow, 2015).

Research into social media strategy is limited. There is some research in this area on some specific aspects of strategy, such as reputation management (Rokka Karlsson and Tienari, 2014), the drivers, activities and benefits associated with social media (Tsimonis and Dimitradis, 2014), practitioner case studies using one organisation such as Finnair (Jarvenpaa and Tuuainen, 2013), B2B companies adoption of social media (Michaelidou, Siamagka and Christodoulides, 2011) and the integration of social media into strategic marketing (Choi and Thoeni, 2016). Choi and Theoni (2016) in particular identify a number of challenges in the area of social media marketing (SMM) and suggest that further research is necessary.

There is a growing interest in the evaluation of the impact of SMM including research driven by the need to demonstrate the return-on-investment (ROI) from SMM (Fisher, 2009; Hoffman and Fodor, 2010; Kumar and Mirchandani, 2012; McCann and Barlow, 2015). There is also interest in the potential of SMM to enhance firm and brand equity (Luo, Zhang and Duang, 2013; Tirunillai and Tellis, 2012). But there is a considerable journey to travel before the impact of SMM can be intelligently assessed. Some offer insights into the wider aspects of the processes associated with

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3 evaluation of SMM in specific contexts (Kim and Ko, 2012; Michaelidou *et al.*, 2011;  
4 Murdough, 2010; Töllinen, Jarvinen and Karjalouto, 2010),

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6 In addition, there has been significant activity on measurement frameworks and  
7 dashboards (Cvijikj, Spiegler and Michahelles, 2012; Marklein and Paine, 2013;  
8 Peters *et al.*, 2013), and some discussion of the need to establish clearly defined goals,  
9 objectives and metrics related to the use of social media (e.g. Hoffman and Fodor,  
10 2010, Murdough, 2010).  
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16 Only Jeffrey (2013) and McCann and Barlow (2015) have proposed frameworks that  
17 link measurement with SMM decision making and campaign planning. Thus far,  
18 neither framework has been empirically tested, and hence are prescriptive in nature  
19 rather than practice-based. Yet, as O'Sullivan, Abela and Hutchinson (2009)  
20 demonstrate, marketing performance measurement ability or frequency is linked to  
21 firm performance. Accordingly, SMM evaluation offers a pivotal context in which to  
22 consider the challenges associated with SMM decision making and management.  
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30 The aim of this research is contribute to knowledge and theory regarding social media  
31 strategy through an exploratory study of the evaluation of SMM, with a view to  
32 proposing a process framework. In addition, this article presents a distillation of the  
33 challenges associated with the evaluation process. Hence, the objectives of this  
34 research are to:  
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- 37 • Identify and define the stages of SMM evaluation, as operationalized by  
38 practitioners, and to propose a conceptual framework.
- 39 • Identify and summarise the challenges associated with SMM evaluation  
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43 Next, previous research on the importance and potential of SMM and its evaluation is  
44 summarised. Then, the interview-based research methodology is outlined. This is  
45 followed by a report on SMM evaluation processes and a discussion of the associated  
46 challenges. Finally, the conclusion summarises the research and suggests  
47 recommendations for research and practice.  
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## 55 **Literature Review**

### 56 ***Social Media Marketing***

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3 Aral, Dellarocas and Godes (2013) argue that social media is ‘fundamentally  
4 changing the way we communicate, collaborate, consume, and create’ (p. 3). Defined  
5 as ‘a group of Internet-based applications that build on the ideological and  
6 technological foundations of Web 2.0 and that allow the creation and exchange of  
7 User Generated Content’ (Kaplan and Haenlein, 2010, p.61), social media are  
8 impacting on a wide range of business processes, from marketing and operations to  
9 finance (Luo *et al.*, 2013) and human resource management (Bolton, 2013). In the  
10 marketing context, social media is seen as essentially different to other forms of  
11 digital media (Hoffman and Novak, 2012; Hennig-Thurau *et al.*, 2010) and as  
12 potentially heralding a paradigm shift in marketing (Hanna, Rohm and Crittaden,  
13 2011).

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23 Indeed, studies demonstrate that participation in a firm’s social media activities  
24 positively affects profitability. For example, Goh *et al* (2013) studied the relative  
25 impact of social media on firm profits and established that user-generated content had  
26 a greater impact on profits than firm-created content. Tirunillai and Tellis (2012)  
27 demonstrate that online reviews and ‘chatter’ are indicators of stock market  
28 performance, whilst Luo *et al* (2013) show that social media based metrics are leading  
29 indicators of firm equity value. Given the significance of social media as an essential  
30 part of everyday business activities, it is important to consider the attributes of these  
31 strategic marketing activities in the modern digital economy.

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40 Honing SMM requires evaluation, but it is evident that development of effective  
41 approaches to evaluation is not straightforward. Online conversations produce large  
42 volumes of semantic data that present considerable challenges to any analysis of  
43 social media activity (Larson and Watson, 2011). As such, an on-going debate exists  
44 surrounding the extent to which social media metrics can be aligned with established  
45 digital and general marketing metrics (Hennig-Thurau *et al.*, 2010; Mangold and  
46 Faulds, 2009; Weber, 2009).

### 51 52 53 ***Social Media Evaluation and Decision-making***

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55 The main body of work relevant to SMM evaluation relates to KPI’s and metrics. For  
56 example, the Social Media Measurement Standards Coalition (Marklein and Paine,  
57 2013) has generated a set of measurement standards as a means of developing SMM  
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3 evaluation metrics. These include: content sourcing and transparency; reach and  
4 impressions; engagement and conversation; opinion and advocacy; influence; and,  
5 impact and value. Cvijik *et al* (2012) have linked metrics and KPI's in a tiered  
6 evaluation framework organised according to the following components: user  
7 analysis, user generated content, engagement analysis, and benchmarking. Peters *et al*  
8 (2013) also studied the links between metrics and KPI's, whilst Pauwels, Amber and  
9 Clarke (2009) debated the contribution of dashboards. Heijnen *et al* (2013)'s  
10 empirical analysis highlights the challenges in measuring KPI's with quantitative  
11 social media datasets, and suggest that such analysis needs to be supplemented by  
12 insights from practitioners' everyday experience. These works have fuelled the debate  
13 around the difficulties associated with SMM evaluation and in particular highlighted  
14 the absence of a holistic, or universally agreed approach.  
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25 In general, empirical research on SMM evaluation is limited; at best, evaluation is  
26 considered a minor aspect of a wider study within social media contexts. For example,  
27 Michaelidou *et al* (2011) found that most B2B organisations do not adopt any metrics  
28 to assess SMM effectiveness. McCann and Barlow (2015) claim that 65% of the  
29 SME's in their sample did not measure the ROI in relation to social media activities.  
30 Some studies mention evaluation but do not elaborate on it to any great extent (e.g.  
31 Choi and Thoeni, 2016; Hanna *et al.*, 2011; Töllinen, Järvinen and Karjaluo, 2012).  
32 Kim and Ko (2012) explore the link between SMM and brand reputation in a fashion  
33 retail environment and suggest evaluation merits further exploration. In general, then,  
34 as suggested by Ruhi (2014), there is a need for empirical investigations that explore  
35 the link between SMM analytics and the generation of business intelligence.  
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46 Prior works make a contribution towards supporting the practices of SMM evaluation  
47 by proposing frameworks that link goals, objectives, KPI's and SMM metrics. For  
48 example, Jeffrey (2013) proposes a measurement process framework that embraces  
49 consideration of goals, stakeholders, objectives, social media KPI's, tools and  
50 benchmarks and analysis. McCann and Barlow (2015) propose a three-stage  
51 measurement framework of the ROI of social media, which includes planning,  
52 implementation, and evaluation. However, both Jeffrey (2013) and McCann and  
53 Barlow's (2015) frameworks are prescriptive in nature rather than reflective of  
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3 practice and their frameworks have yet to be empirically tested. Furthermore, both  
4 proposed frameworks lack a formal definition of the actions at each stage.  
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## 8 **Methodology**

### 9 *Interview process*

10 Since SMM, and more specifically its evaluation, are at a relatively early stage of  
11 development with limited prior research, an exploratory study that adopted an  
12 inductive approach was chosen for this research. This approach provided the  
13 opportunity to develop a framework and gather deep insights into the actions and  
14 challenges embedded in the evaluation of SMM. It also provided structure and  
15 flexibility to ensure the coverage of key themes whilst accommodating unanticipated  
16 insights (Bryman and Bell, 2010; Saunders, Lewis and Thornhill, 2009; Kvale and  
17 Brinkmann, 2009).  
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27 The study used semi-structured interviews with key informants. The interview  
28 protocol was informed by the relevant literature and was further refined through pilot  
29 interviews with four practitioners to test rigour, validity and appropriateness (Bryman  
30 and Bell, 2010). All questions were open-ended, thus not limiting the interviewee's  
31 choice of answers (Gubrium, 2002) and were supplemented by prompts to ensure  
32 coverage of key themes associated with each stage (Creswell, 2013). In-depth  
33 interviews were conducted face-to-face in the informants' offices, a setting where  
34 interviewees could elaborate and show supporting documents (Creswell, 2013).  
35 Informants were assured of confidentiality and anonymity and careful attention was  
36 paid to other ethical issues (Bryman and Bell, 2010).  
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### 46 *Sample*

47 In identifying informants for this study, a purposive sampling approach was used to  
48 seek out information-rich cases (Patton, 1990) with key informants who were able to  
49 comment on current practice and experience in the evaluation of SMM. Such  
50 professionals have considerable experience of SMM across a wide range of clients.  
51 Eighteen specialist marketers were interviewed (Table 1), all of whom either had  
52 responsibility for SMM, or more generally digital marketing within their agency.  
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This number of informants is consistent with other qualitative studies in this field (e.g. Veloutsou and Taylor, 2012; Wallace and Chernatony, 2007).

Using agency practitioners as key informants provides broader insights into SMM evaluation than would have been possible through direct conversations with brand owners. The specialist agencies included ranged from multi-national marketing agencies servicing global client brands, through to small and micro agencies with a UK client base, embracing UK national, regional and sector-specific brands.

During the interview process, all informants referred to more than one client brand, such that, in total, perspectives gathered during the interviews encompassed 78 brands, in the following sectors: sports, retail, automotive, drinks, hospitality, professional services, transport, and not-for-profit organisations. Client brands which were discussed in the interview were broadly classified as Large (International, or National), SME, or Microbusiness (Table 1).

**Table 1: Informant Profile**

Informant	Informant Role Title	Size of Agency	Clients	Typical client size
P1	Head of Social Media	SME	4	SME
P2	Head of Social & SEO	Micro	4	Micro/SME
P3	Head of Social Media	Large/International	5	Large/International & National
P4	Digital Strategy Director	Large/International	4	Large/International & National
P5	Head, Digital Marketing	Micro	4	Micro
P6	Head of Social Media	Large/International	3	Large/International & National
P7	Head of Social Media	Large/International	5	Large/International & National
P8	Head of Social Media	SME	3	Large/International & National
P9	Head of Social Media	Micro	6	Micro/SME
P10	Head of Social Media	Micro	4	SME
P11	Head of Digital Marketing	SME	4	National & SME
P12	Head of Digital Strategy	SME	6	National
P13	Director	Micro	3	National
P14	Social Media Manager	SME	4	SME
P15	Head of Digital Marketing	SME	6	SME & Micro
P16	Digital Marketing Executive	Micro	3	SME
P17	Social Media Consultant	Micro	2	Micro
P18	Social Media Consultant	Micro	3	SME

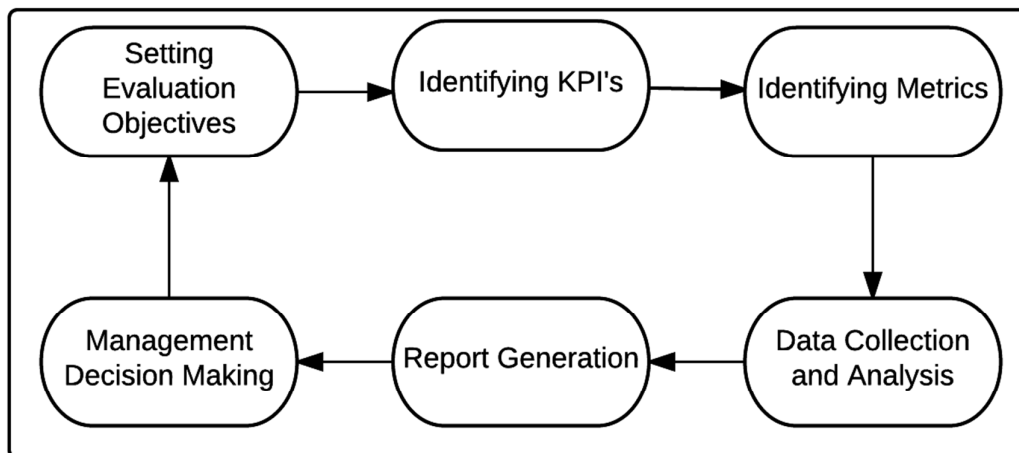


### *Data Analysis*

Thematic analysis of the interview transcripts was conducted in order to develop a rich description of the dataset and to identify implicit and explicit ideas in the data (Creswell, 2013). Thematic analysis is appropriate in research such as this that adopts an inductive approach and seeks to construct theories that are grounded in the data (Charmaz and Belgrave, 2002). Thematic analysis followed the six phases recommended by Braun and Clarke (2006): familiarization with data, generating initial codes, searching for themes among codes, reviewing themes, defining and naming themes, and producing the final account of the findings.

The data was initially analysed interview transcript by transcript, before checking for verification across transcripts (Miles and Huberman, 1994). The analysis was completed manually supporting a closeness to the data which allowed distinctive themes to emerge and encouraged detailed knowledge of each theme (Eisenhardt, 1991). This analysis led to the identification and emergence of the six stages of the framework, challenges and responses to challenges associated with each stage (as shown in Figure 1, Table 2 and Table 3)

*Figure 1 Social Media Marketing Evaluation Conceptual Framework*



### **Findings**

Figure 1 shows the stages of SMM evaluation that emerged from the interviews. It is presented at this point to assist in structuring the details of this section, and was not

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3 pre-determined before the interviews were conducted. In the remainder of this section,  
4 insights offered on the challenges associated with each of these stages are presented.  
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### 8 ***Setting Evaluation Objectives***

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10 There is a recognition that identification of specific and clear evaluation objectives,  
11 which are aligned with wider marketing, and overall business goals are vital. This is  
12 embedded in the fact that SMM is typically a component of a multi-channel  
13 marketing campaign:  
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15 *‘...you would never have just a purely social media campaign unless you were*  
16 *a massive brand, it’s typically an add-on that we sell to existing clients.’ (P15)*  
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22 Evaluation objectives act as a benchmark to help measure the performance of a firm’s  
23 campaign. They are typically developed in the pre-campaign planning process and  
24 should govern the KPI’s and metrics collected in assessment of campaign  
25 performance. Objective setting starts with consideration of the wider business and  
26 marketing objectives and seeks to identify and align appropriate SMM objectives:  
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29 *‘The strategy would link the business objectives through their communication*  
30 *and marketing objectives, to create social [media marketing] objectives’ (P3)*  
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35 However, this process is far from straightforward. Several informants suggested that  
36 clients exhibited difficulty in articulating their SMM objectives, due to their lack of  
37 understanding of social media as a marketing channel:  
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40 *‘At the moment, the client is not that digitally savvy and they are trying to*  
41 *rethink their own marketing plan and how they go about it’ (P4)*  
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45 On occasions, this situation is resolved through meetings and negotiation:

46 *‘What they would like is for us to sit down with them and have a strategy*  
47 *meeting where we talk about what are the most important goals and talk about*  
48 *how we might theoretically go about achieving them.’(P12)*  
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3 It is evident that in this stage and other stages in the evaluation cycle, approaches vary  
4 considerably between brands. Some clients and their agencies engaged in a thorough  
5 pre-campaign process that included consideration of objectives:  
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8 *'We would have a workshop so that they can understand what they want and*  
9  
10 *identify their aims and objectives for their business.'* (P3)  
11

12 In other instances, planning of evaluation is more *ad hoc* or *post hoc*, with the agency  
13 taking the initiative, often without discussion regarding the clients' marketing  
14 objectives:  
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17 *'I will prepare a little mini report and say Facebook fans went from this to*  
18 *this'* (P4)  
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20 *'Clients expect a fairly basic report, measurement isn't something they often*  
21 *want'*(P15)  
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### 29 ***Developing Key Performance Indicators***

30 Following on from setting evaluation objectives, identification of KPI's are  
31 imperative for effective evaluation of a campaign. Informants were very aware that  
32 their agency was being judged on their performance as measured by KPI's and hence  
33 very conscious of KPI's. As such, discussion of KPI's constitutes a crucial stage in  
34 the establishment of the measurement framework. Informants recognised the  
35 importance of KPI's. As such, discussion of KPI's constitutes a crucial stage in  
36 the establishment of the measurement framework. Informants recognised the  
37 importance of KPI's; many informants referred to setting KPIs, often linking them to  
38 the assessment of performance, and viewing the achievement of KPI's as an  
39 indication of the agency's value to the client:  
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43 *'we pride ourselves on really knowing our clients; we know that their key*  
44 *KPIs are going to be x, y and z'* (P5).  
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50 However, few informants could be prompted to further elaborate on specific KPI's.  
51 An exception was P11, who mentioned specific KPIs, including engagement, reach,  
52 and conversions:  
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55 *'If we have advertising running, how much does that increase our reach? I*  
56 *like to see what the organic growth rate is like, what the engagement was like,*  
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3 *how we sort of build it within the first month, then, I can forecast how it is*  
4 *going to go for the rest of the campaign. We would set for conversions, say*  
5 *month 1 in October, they got 50 social conversions.'*  
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10 For each KPI, a target is set. Given the relative limited previous experiences on use of  
11 SMM, target setting can be difficult. For instance, this quote from P12 suggests that  
12 target setting is not necessarily revised as campaign's evolve:  
13

14 *'At the end of the year a lot of the targets were over-reached, as we started*  
15 *doing advertising and competitions and more engaging stuff, so it became*  
16 *apparent that the targets didn't actually mean anything'*  
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23 Return on Investment (ROI), rather than KPI's was referred to by some informants:

24 *'{The Client} wanted to see the ROI on the (SMM) campaign and to a certain*  
25 *degree, we can say we expect this to draw this many website visits' (P4)*  
26

27 *'They {The Client} love ROI! People go into their website, making a booking*  
28 *which goes to sales team. The average booking will normally generate £30, so*  
29 *that is the figure what I have been told to work to' (P16)*  
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37 One campaign that was specifically designed to support calculation of ROI was  
38 mentioned:  
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40 *'We ran a Facebook offer, which we measured separately. That's in-store*  
41 *redemption only, run at one store in {Client Store}. We know how much we*  
42 *spent and how much was redeemed so it was easy to run stats. There was a*  
43 *14% redemption rate and it cost £2.50 per person that bought*  
44 *something.'* (P10).  
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### 52 53 54 **Identifying Metrics**

55 Informants identified metrics such as the number of mentions, likes, and followers,  
56 which are widely available from social media platforms.  
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3 *'We do a monthly social media report. We do fans, followers, mentions' (P4)*

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5 *'How many people are mentioning the brand. Social mentions are great*  
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7 *because it shows it is getting the name out there' (P6)*

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10 *'...these are your awareness metrics, likes, people commenting, things like*  
11 *that; [the customer journey is] awareness, engagement and then sales' (P3).*

12  
13 However, another informant suggested that there too many metrics within SMM, and  
14 that this could lead to an overly speculative approach to measurement:

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16 *'We make too many assumptions and there is too much guess work in social*  
17 *media. I like to know exactly the effects of my marketing.'* (P5)

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22 Although it was acknowledged that specific metrics should be chosen on the basis of  
23 the KPI's, with a set of metrics relating to each KPI, in reality there was a reliance on  
24 statistics generated by social media platforms:

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27 *'You talk about social media as your owned channels, but they're not. They*  
28 *are owned by Facebook or owned by Twitter, you are just being permitted to*  
29 *use the technology.'* (P16).

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33 Sometimes clients were observed to think solely in terms of these metrics, and forget  
34 about objectives and KPI's:

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37 *'they might say, "We want to set a goal to reach like 4,000 likes by the end of*  
38 *the 3-month period." That is when we have to say we can do that but that*  
39 *doesn't mean it has met the [campaign]objectives at all.'* (P13)

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43 Informants expressed their concern regarding the reliance upon statistics generated by  
44 social media platforms, and there was some scepticism regarding the value of these  
45 metrics. An associated concern related to understanding what the data means, as well  
46 as its lack of stability:

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50 *'Facebook insights for apps, but it's hard to figure out what any of the stats*  
51 *mean because they are not really fully explained within Facebook and the*  
52 *problem is that Facebook is always changing' (P12)*

### ***Data collection and analysis***

The selection of metrics and the analysis process adopted is influenced by the social media platforms used by the informants, many of which provide their own sets of analytics. Although both *Facebook Insights* and *Google Analytics* were widely used, all informants referred to using *Google Analytics* as the *de facto* data collection tool for SMM evaluation, as identified by P7:

*'We'll use Google Analytics a great deal and all the lovely stuff that comes with that' (P7)*

Arguably, the widespread use of *Google Analytics* is because of its established presence in digital marketing in general, such that it allows parallel collection and analysis of data across beyond social media e.g., websites, search engine marketing and email marketing channels:

*'Everything we do is linked up with the SEO guys, the Google Analytics guys and the econometrics team' (P3).*

*Facebook Insights* was the second most commonly mentioned SMM evaluation tool. A variety of tools were mentioned such as: *Sprout Social, Hootsuite, Brandwatch, Radian 6, BuzzMetrics*, which were often viewed as supplementary to *Google Analytics*:

*'After Google Analytics we use Brandwatch mainly' (P4)*

*'I dabble, so I use Sprout Social, TweetDeck, Hootsuite and Facebook' (P16)*

The limitations of existing tools are driving the search for better tools:

*'We've just found a new tool that helps us to look at it a bit deeper and ...we are going to change the strategy' (P5)*

And the simultaneous use of several tools:

*'No tool does everything you want in social media. If it doesn't measure real world business outcomes as well as correlate with other sets of information, it's not going to be very useful.' (P3)*

*'I wouldn't use them {tools} all for one client but between them all. I do daily checks across all social media brand pages.' (P16)*

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A few informants mentioned the development of bespoke metrics/analytics dashboards. In one instance, the dashboard was built for a specific client, and incorporated both KPI's and associated metrics.

*'For one bigger client we have built a digital dashboard, which pulls in through the Twitter and the Facebook KPI based on what (clients) requirements are. That pulls stats every forty-eight hours from Facebook and from Twitter' (P12)*

Finally, it was acknowledged that metrics and tools are in a continuous state of flux, with some of these changes having potential to drive significant changes in the SMM evaluation processes:

*'Metrics change on such a regular basis and the Industry standards fluctuate so that much that it is so difficult to keep up.'* (P12)

*'Facebook is always changing, it never stays the same. We can build something that does work for a certain period of time and then it they change!'* (P11)

### **Report Generation**

Once data collection is complete, reports are generated for clients. All agencies engaged with this process as part of their contractual responsibilities. Reports are compiled of the various metrics that it has been agreed with the client will be measured:

*'On a weekly basis for all clients, we will create a weekly set of metrics which includes follower, social growth, web site traffic referred to from our social media activity, last click revenue' (P3)*

Informants viewed the reporting process as an important component of ensuring a productive agency-client relationship. The nature and frequency of the process is



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3 shaped by a combination of what the client requires, and the metrics available. For  
4 example:

5  
6 *'With {Client}, everything has to go on an A3 piece of paper. They specify that*  
7  
8 *with all your slides. You have to say what you have to say within twenty*  
9  
10 *seconds' (P1)*

11  
12 *'{Client} are quite demanding and their requirements are very specific so*  
13  
14 *that's very helpful because it does structure how we have to approach their*  
15  
16 *reporting.'* (P12)

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21 There was some disagreement as to the optimum frequency of reporting with daily,  
22 weekly and monthly reports being provided for clients. Frequency of reporting  
23 differed with the type and size of the client. Interestingly, informants did not rely to  
24 any great extent on the reporting functions of the metrics and analytics tools (that  
25 supported data collection), but rather preferred to structure and format the report for  
26 the client. In this manner, it was easy for them to identify key trends and outcomes,  
27 and in some cases to make the link to the clients' KPI's:

28  
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31  
32 *'We don't use anything that that just pulls the data for us because we have got*  
33  
34 *an amazing tech guy who built a report that pulls metrics plus KPIs so that*  
35  
36 *everything updates automatically' (P11)*

37  
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40  
41 In most cases, SMM practitioners use statistical software, often Microsoft Excel, to  
42 combine and distil the key information from the various data sets. Although report  
43 generation tools are available, these were regarded as too expensive:

44  
45  
46 *'That technology is still to catch up and unless you can afford to buy one of*  
47  
48 *the big tools that will do the whole report for you and you can just print it at*  
49  
50 *the end of the month.'* (P11)

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55 Some agencies created real-time dashboards for campaign performance figures for  
56 their large clients such that the clients are able to interrogate the datasets themselves:

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*'They do that by using the dashboards to pull the figures themselves. Every month there is a report which they go in and type some information into and then the report generates itself ready on A3 format for them to save off as a (Adobe) .pdf and then they email that to the client to talk about at their monthly meetings' (P12)*

*'In terms of the bigger clients we manage, we built digital dashboards which pull in through the Twitter and the Facebook KPI. It has been running for about a year and a half using those metrics that we agreed.'* (P8)

Because reporting processes were part of a contractual arrangement with individual clients, there was considerable variation in reporting practices and report formats, even within one agency. Clients reporting requirements were seen to be heavily dependent on their budget:

*'it really depends on the client and how much they will pay for the evaluation'*(P8)

However, because reporting was viewed as a pivotal aspect of the contractual relationship there was sometimes tension between the agency and their clients:

*'[Client] wanted everything quantified but I think they want us to give them a list of how much traffic it will produce so that when it doesn't they can beat us with it and not pay us' (P4)*

*'[The Client] wants monthly content plans with every piece of content. It is just absolutely crazy the level of stuff they need.'* (P9)

### **Management decision making**

The final stage of the SMM evaluation cycle involves discussion between the agency and their clients on the contents of the report as a basis for decision making regarding

1  
2  
3 the next phase of SMM. This consultation is a collaborative event during which the  
4 performance of recent activities is discussed.

5  
6 *'A workshop is more of a collaborative thing rather than standing up and*  
7  
8 *pointing at lots of PowerPoint slides' (P2)*  
9

10 Informants also commented that they saw their role as not simply informing, but also  
11 educating their clients, enabling both parties to reflect on the performance of the  
12 campaign as well as helping to inform future actions:

13  
14 *'...if we are not entirely sure that they are ready yet...we would give them*  
15  
16 *some training... what we think they should do and they make a decision off the*  
17  
18 *back of that for whether they should commit to it' (P6).*  
19

20  
21 *'Basically we give them the first report, the report with their results on and*  
22  
23 *then we have to go through each of the stats with them over the phone because*  
24  
25 *they really wouldn't understand what any of them means' (P12)*  
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30 Some concern was also expressed that some SMM evaluation reports were not being  
31 read or used in subsequent decision-making:

32  
33 *'Some of them won't even look at it...they will circulate it in their office and*  
34  
35 *no one will read it.' (P13)*  
36

37  
38 *'..we just send it {SMM evaluation Report} over and we get nothing back'*  
39  
40 *(P11)*  
41

42  
43 *'The smaller SME's that we work with, they aren't really bothered, just say*  
44  
45 *thanks and keep on tweeting!' (P13)*  
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## 48 **Summary**

49 Table 2 summarises the findings, offering, on the basis of the data from the  
50 interviews, a definition of each stage of the framework, the challenges discussed, and  
51 approaches adopted for addressing those challenges.  
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Table 2: Definitions, Challenges and Responses Associated with Social Media Marketing Evaluation Framework Stages

Framework Stages	Stage Definition	Challenges	Responses to Challenges
<b>Setting Evaluation objectives</b>	Identification of specific and clear evaluation objectives, which support wider marketing, and overall business goals	Lack of client understanding of social media as a marketing channel Ad or post hoc evaluation, without reference to specific objectives	Workshop Events to further the understanding of clients knowledge of SMM in practice
<b>Identifying KPI's</b>	Identification of the most appropriate performance indicators which support the objectives and the campaign,	Vagueness regarding specific or appropriate KPI's Iterative target setting for KPI's Linking metrics to ROI, without reference to specific KPI's.	Examining previous campaign reports to clarify performance indicators, linked with successful campaigns
<b>Identifying metrics</b>	Identification of the specific metrics which will need to be collected and enumerated in the evaluation process.	Influence of analytical tools on metric selection Metric overload Reliance of social media platform statistics, leading to lack of transparency and instability	Utilising SM Platforms own metrics, as well as bespoke metrics relevant to the client firm
<b>Data collection and analysis</b>	Collection of the previously identified metrics, and KPI's from the relevant channels. Analysis will be performed at this stage elucidating the campaign behaviour and performance	Heavy level of dependence on Google Analytics and Facebook Insights Limitations of existing social media analytics tools. The need to use several tools, or to develop tailored dashboards	Development of bespoke data collection systems, often in a dashboard format drawing data in from several SM points.
<b>Report generation</b>	Compilation of the KPI's and metrics into a presentable format, highlighting the overall campaign performance with notable insights.	Selecting the data for inclusion, and presenting it in an accessible format Deciding on optimal frequency of reporting, extending from real-time, through weekly and monthly Designing reports that contribute to a productive agency client relationship, whilst also meeting contractual requirements	Consultation with clients to ascertain the most useful form of report, or reporting event.
<b>Management decision making</b>	Evaluation reports are presented to the client enabling a reflection on the performance of the campaign as well as informing future iterations	Ensuring that reports are read and used to inform decision-making for subsequent campaigns. Ensuring that the decision making is a collaborative Embedding learning about social media in the agency-client consultation process.	Hold regular meetings with clients to enable reflection and decision making which impacts future campaigns.

## Discussion and Contribution

### *Proposing a framework and a definition of social media marketing evaluation*

This research has established that practitioners view the SMM evaluation process to have six stages as shown in the SMM Evaluation framework in Figure 1. On the basis of this framework, the following definition of SMM evaluation is offered as guidance for effective deployment and measurement of SMM:

*Social media marketing evaluation is a strategic management process that commences with the identification of social media marketing objectives, proceeds to the selection of appropriate KPIs and metrics, involves the collection of quantitative and qualitative data, to populate metrics and generate insights, which are distilled into report format and concludes with management decision making that influences future campaign objectives and strategies.*

This exploratory study offers evidence to support aspects of Jeffery's and McCann and Barlow's frameworks, as well as offering a definition of each stage. McCann and Barlow propose three key stages to SMM management: planning, implementation and evaluation, and includes a number of the activities reported in our framework but it is difficult to map this directly onto our framework. Mapping our framework and Jeffrey's is, however, instructive. Both have stages relating to objectives, KPI's, metrics as well as data analysis, however our framework also specifically considers data collection. It is in the 'contextual stages' that there is the most significant divergence. Informants in this study discussed in great detail the process of report generation, whereas Jeffrey focuses to a greater extent on presenting to management. Both frameworks have a concluding management decision making stage, but our framework does not mirror the Goals and Stakeholder stages of Jeffrey' framework.

This divergence is evidence that Jeffrey's framework does not significantly acknowledge that much SMM activity is managed by specialist (and often small) digital or SMM agencies. Whilst they may have an advisory role in management decision making, goal setting and consultation with stakeholders, their involvement is

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2  
3 variable. In other words, our framework draws important attention to the context in  
4 which SMM evaluation is undertaken.

5  
6 Apart from the frameworks proposed by Jeffery and by McCann and Barlow, prior  
7 research on SMM has largely centred on metrics, analytics, and dashboards, and  
8 largely ignored the embedding of such tools into marketing decision making  
9 processes (Cvijikj *et al.*, 2012; Heijnen and Reuver, 2013; Marklein and Paine 2013;  
10 Pauwels *et al.*, 2009; Peters *et al.*, 2013). Indeed, informants in the research reported  
11 in this study had more to say about the later stages of the framework, than they did  
12 about setting evaluation objectives and identifying KPI's. Nevertheless, it is  
13 particularly important to contextualise the latter stages of the evaluation process. The  
14 reluctance to focus on this context may derive from the relative novelty of SMM, such  
15 that agencies, and, in particular their clients, have insufficient experience of SMM  
16 campaigns to be confident of the impact of a specific campaign. In terms of the  
17 contractual relationship between the agency and the client, both parties are therefore  
18 often inclined to feel vulnerable (Grant *et al.*, 2012).  
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### 30 ***Challenges in social media marketing evaluation***

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32 In addition to identifying the stages in SMM evaluation, this research offers deeper  
33 insights into the challenges associated with this process, as summarised in Table 2.  
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37 As mentioned above, many of these challenges arise from the relative novelty of  
38 SMM and therefore the limited experience with SMM of both parties. This has  
39 potential to make the relationship between the agency and the client more volatile.  
40 There is a longstanding literature on agency-client relationships that assesses the  
41 challenges in this relationship, how it can be best managed, and what happens when it  
42 fails (Haytko, 2004). This literature suggests that a long terms relationship is optimal  
43 for both parties (Waller, 2004), but its focus on conflict and switching suggest that  
44 this is difficult to achieve (Davies and Prince, 2010).  
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52 In this study, throughout the various stages, informants continually referred to 'the  
53 clients want ...', suggesting a relationship in which the client is perceived to be in  
54 control. Typically, such relationships are based on clearly drafted contracts, which  
55 include clear and attainable objectives and KPI's. In this study, there is evidence of  
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3 difficulties in this arena, as well as in the stages associated with report generation and  
4 management decision making. For example, it seems that agencies find it difficult to  
5 ensure that evaluation reports are read and used to inform decision-making, and are  
6 sometimes provided with little guidance from clients as to the desired style of  
7 reporting. Recent contributions to the agency-client relationship literature, suggest  
8 that collaborative planning and a co-creative approach are the best way forward  
9 (Kohtamäki and Partanen, 2016). Fan and Gordon (2014) and Töllinen, Järvinen and  
10 Karjaluoto (2010) suggest that this is particularly appropriate in the context of SMM.  
11 Interestingly, there is indeed evidence of the adoption of approaches that involve  
12 collaboration in this study, as summarised in the final column in Table 2. Informants,  
13 for example, report using workshops, regular meetings with clients, and consultation  
14 on the most useful form of reporting.  
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24 The other main challenge that runs in parallel with the management of the agency-  
25 client relationship is the tension between the social media metrics that best align with  
26 KPI's, and the readily available social media analytics provided by most of the major  
27 social media platforms. Informants were keen to discuss at length the weaknesses of  
28 this data, arguably because the use of these tools is an integral part of their working  
29 activities, such that they were very conscious of the limitations of these tools. Key  
30 issues reported included: lack of clarity as to how the analytics were created,  
31 unannounced changes in analytics, and the need to integrate analytics from different  
32 social media platforms, sometimes into a tailored dashboard. No prior studies have  
33 reported on these challenges, although there is some discussion on this in the  
34 practitioner literature (Sponder, 2012).  
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45 In summary, agency-based informants feel that their main challenges in evaluation of  
46 SMM campaigns relate with working with their clients and the social analytics tools  
47 that they need to use to generate performance reports, both of which have potentially  
48 significant consequences for the success of SMM.  
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## 53 **Conclusion**

### 54 ***Summary***

55 This research contributes to knowledge and theory in the area of SMM strategy. First,  
56 it proposes the Social Media Marketing Evaluation Framework that identifies the  
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3 stages in the decision-making associated with the evaluation of social media  
4 campaigns: *Setting evaluation objectives, Identifying KPI's, Identifying metrics, Data*  
5 *collection, Report generation, and Management decision making.* Furthermore,  
6 discussion with marketing practitioners has identified challenges associated with each  
7 stage in the SMM evaluation cycle. Whilst some of the challenges relate to practical  
8 considerations such as the availability of effective analytics tools, the biggest  
9 challenges lie in the evolution of the relationship between the agency and their clients,  
10 in a realm in which marketing and its evaluation continues to require learning and  
11 adaptation on the part of both agencies and clients.  
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### 19 ***Theoretical and practical implications***

20 The Social Media Marketing Evaluation Framework has value for both theory  
21 development and marketing decision-making. In common with other theoretical  
22 frameworks, it can be used as a means of organising observations, and to simplify and  
23 abstract real world complexity (Brady and Collier, 2010).  
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29 For researchers, this Framework can be used to identify gaps in the evolving body of  
30 knowledge associated with SMM and its evaluation, and to position specific  
31 contributions in this area, in relation to other aspects of the SMM evaluation process.  
32 For example, there is a growing body of work on metrics and KPI's for social media,  
33 but this is rarely contextualised with respect to other aspects of social media strategy  
34 and planning.  
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40 For practitioners, the Framework can be used to guide strategic decision-making and  
41 engage managers and other stakeholders, assisting them in effective communication  
42 and participation in processes associated with evaluation and strategy formulation. In  
43 particular, by identifying some of the challenges and responses used by other  
44 practitioners it offers insights associated with the development and evolution of  
45 agency-client relationships in this context.  
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### 51 ***Limitations and recommendations for further research***

52 As indicated earlier, one of the limitations of this study is that it is based on the  
53 agency perspective. This is both a strength and a weakness; agencies are involved in  
54 seeing through the complete social media campaign and understand the technologies  
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3 and processes. On the other hand, they may be less familiar with the brand that is  
4 being promoted, and, particularly in the case of smaller agencies specialising in social  
5 media, may have limited awareness of their clients' marketing initiatives through  
6 other channels. Hence, there is scope for further research from the client perspective.  
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8 Further insights may also be gained through the use of other research approaches.  
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10 Case studies, for example, would allow a focus on specific campaigns, with a view to  
11 generating deeper insights into the specific KPI's, metrics, analytics and their  
12 relationships and associated decision-making processes.  
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18 More generally, there is scope for further research into the strategic planning and  
19 evaluation of SMM activities and campaigns. To support both theory development  
20 and the development of effective practice, further research in the following areas is  
21 called for:  
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- 24 (i) linking typical KPIs and marketing, sales and branding objectives to SMM  
25 interventions and metrics, and their contextualization within a multi-  
26 channel marketing strategy or campaign.
- 27 (ii) investigating the relationships between the SMM evaluation procedures  
28 and wider marketing planning;
- 29 (iii) evaluating the relative merits of qualitative and quantitative metrics, and  
30 the ways in which they can be used to inform future SMM strategies;
- 31 (iv) strategic decision making processes associated with SMM; and,
- 32 (v) collaborative creative industry campaign planning involving both clients  
33 and agencies.  
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43 Finally, social media is a rapidly developing field, such that many of the specifics of  
44 SMM and its evaluation are likely to change, with the evolution of technologies and  
45 of the behaviours of social media users. So, although the overarching model  
46 developed in this research and associated challenges are likely to remain relevant  
47 emerge in future SMM practice, there is a general need for continuing research into  
48 social media strategies and their impact.  
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