EVALUATION & SOCIAL MEDIA

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CENSE Research + Design
Evaluation & Social Media

This guide is designed to provide you with a background on the theories and the methods used to inform evaluation of social media interventions. It will provide a brief introduction to what social media is, systems thinking (and why it is relevant for social media), the concept of Developmental Evaluation, as well as tools and metrics to support evaluation with various technologies. Lastly, we’ll consider ways to bring these together with an overall social media strategy.

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What is social media? Social media is a class of tools and technologies used to describe media that derives its value from social interaction. That means the content and the manner in which the content is used and distributed is determined by the users of that content. Unlike traditional forms of health communication, social media is about both one-to-many and many-to-many forms of shared content.
There are hundreds of services and programs that employ social media and many of these forms use text, video, photos and audio content in various combinations. For this guide, emphasis will be placed on social media tools and services that are most popular as a means for health promotion.

These include:

1. Social network multimedia platforms like Facebook, LinkedIn and Google+
2. Video sharing channels like YouTube
3. Online customizable webpages and journals (Blogs)
4. Microblogs like Twitter
5. Photo sharing channels like Flickr
6. Geolocation tools like Foursquare

Social Media is all about relationships first and foremost. Rather than one-to-many forms of health communications, social media is about supporting many-to-many interactions. Unlike traditional communications strategies, messages are directed “at” or “to” people; social media involves creating relationships with the audience. It is about building up a relationship with many people with the full sense that such a relationship will look different from person to person and from your organization to your audience.

Just like in any good relationship, sharing is essential. Your ability to share what you know and receive information from others is critical to effective use of social media. Sharing means being open, transparent and honest in your dealings online. It sounds simple, but often the communication we use with our audience is done as part of an effort to convey a particular message in a manner that is controlled and employs a style and focus that is consistent and clear. Social media does not permit much message control and thus, sharing may put us in a position of vulnerability with our audience that can be problematic when viewed from the perspective of a strategy that requires tight adherence to a particular message structure.

What kind of relationship do you want with your audience?
Let's have a **conversation**.

Social media lets the **content be co-created and shared by your users**. Social media tools are means to initiating conversation with your audience; not speaking to them, but with them. And like a conversation, it means that there must be some give and take and a certain rhythm that is hard to predict, impossible to fully control, and requires attention and subtlety to fully negotiate. Like sharing, conversation means giving as well as taking and contributing insights that might not be well-scripted or fully in-sync with a tightly controlled messaging structure. Conversation is less formal and opens up opportunities to go places that you had not anticipated. None of this implies that a clear message and strategy is abandoned, however, what is expected is that there will be space for divergent and diverse perspectives.

Social media is social, and that means attending to the mores and conventions of social life. It involves attending to certain patterns and rhythms that are emergent, placing relationships at the centre of your strategy, becoming transparent in your communications, and encouraging exchange, not just pushing information out.

While there may not be such a thing as an effective conversation, there are conversations that are more interesting, provide greater learning opportunities, and lead to more useful things than others. The same applies to social media.

*What kind of conversation do you want to have and what do you want to talk about?*
Thinking Strategies for Social Media Impact:
Systems, Design and Development
2. Systems Thinking & Complexity

Systems thinking describes a class of theories and models of the world that look at the way systems function and how the interconnections within those systems explain behaviour. Social media works within a particular type of system, one that is complex in its nature and its outcomes. Complexity refers to situations where multiple, dynamic actions and actors interact to produce outcomes that cannot be predicted beforehand.
With **simple situations**, there are relatively few components involved and it is possible to produce a consistent, predictable outcome each time a strategy is executed. This is the realm of best practice.

**Complicated systems**, ones with many parts that are organized in an ordered way, have more variability within them that prevents predicting outcomes with great accuracy, yet it is possible to implement a strategy that creates reasonably consistent outcomes each time it is delivered.

**Complex systems** are those with much diversity in the interacting parts and little certainty about the outcomes in advance. At best, conditions can be set that help anticipate particular activities, but the outcomes cannot be predicted.

**Complexity**

A complex system presents problems differently than one that is simple or complicated. For that reason, we need to know a little about this phenomenon in order to design appropriate evaluations that reflect this complexity. The following concepts are, not surprisingly, a little complex to grasp.

**Complex systems** often have the following qualities:

- **Non-linear**: Change doesn’t always happen in predictable ways and “movement” can be in any direction at any time.
- **Emergent**: Interaction between diversity produces new patterns – ideas, knowledge, and structures – that cannot be predicted ahead of time and are highly context dependent.
- **Dynamic**: Change is continuous throughout and often exists at different rates at different times.
- **Adaptive**: Agents within the system adapt to feedback gained within the system.
- **Uncertainty**: The outcomes of any interaction can at best be anticipated, but never fully predicted due to the changing nature of the system.
- **Coevolutionary**: Interactivity produces new patterns and structures that can work together to change the entire system.

Why is this important? Social media exhibits most of these qualities most of the time when observed in everyday use and interaction. From the perspective of strategy development and evaluation, it is important to be aware that social media interactions cannot be controlled, but they can be influenced. Like a good conversation, one has to provide input and guidance and let the rest emerge and adapt to what comes along the way.
What does this complexity look like in the context of social media? The dynamic, interconnected environment that social media creates requires a strategy that works with this complexity rather than against it. Building on the previous concepts from complexity science, here are ways to work with complex adaptive systems productively in developing a strategy for social media use:

**Non-linearity:** Conversations are unpredictable, they jump around and don’t often follow a path that can be predicted, controlled or managed. In health communications with social media, the practitioner’s role is to support conversation, provide probes for discussion and explore opportunities in divergent strains of thought in a conversation thread to introduce ideas or provide information.

**Emergence:** As conversations unfold, new things come out. This provides an opportunity to understand what is most important to your audience and serve as a place for innovation and learning. In social media, it is important to be mindful that your audience will tell you what is most important by what they gravitate to, not the other way around.

**Dynamism:** Conversation flow will change, ebb and flow as new ideas are presented and different users engage. Just as the conversation develops, so too does the approach to engaging the audience. Strategy must be adjusted continually to reflect these changes.

**Adaption:** Rather than “ready, aim, fire”, social media uses a strategy that is more “ready, fire, aim”, By paying attention to what your audience is interested in and adapting the strategy to suit this (or redirecting them back to a path more comfortable for your organization if that is appropriate), an adaptive social media strategy allows practitioners to maintain and grow relationships.

**Uncertainty:** The constant change in social media tools and conversation means that you can’t fully know what will come from any conversation. Health practitioners using social media to its fullest need to accept this.

**Co-evolution:** As parts of the strategy unfold, new patterns emerge and may mesh with existing structures that evolve together. As you shape social media conversations, it may shape your organization.

3. Developmental Evaluation

Working with complexity in evaluation
Complex programs require an evaluation strategy that acknowledges complexity while maintaining rigour. Developmental evaluation (DE) is an evaluation approach designed for the innovative and novel situations that social media presents. Unlike traditional evaluation, which is aimed at assessing impact related to specific benchmarks, DE is aimed at program development and strategic learning.

Consider a conversation, something at the heart of social media. A conversation cannot be judged to be effective (akin to an outcome evaluation), but it can be assessed in terms of how much one learned from it, what kind of learning took place, whether it was engaging or not, and what kind of actions were decided because of it. This learning can also help shape future conversations. This is an example of a developmental evaluation issue vs. a traditional summative evaluation.

DE focuses on social innovation: the novelties and emergent properties that come from working with complexity to create and refine products and services aimed at influencing positive change in social settings. Specifically, DE:

- Assists social innovators in exploring possibilities within their programs, identify problems and needs, and aid in deriving solutions and strategies for adaptation
- Develops promising innovations;
- Supports adaptation in complex environments;
- Documents what actions innovators take, the short-term results and consequences associated with these actions (large and small), and connect them with the larger vision of the program;
- Identifies emergent processes and outcomes and aids in making sense of how these new properties can support innovation;
- Determines if an innovation is ready for formative evaluation as a pilot intervention

(adapted from Patton (2010))
The critical distinction between DE and other forms of evaluation is the focus on program development, not program improvement. Consider the example of a conversation, something that is at the heart of social media. How can you assess whether a conversation was effective? Conversations have purpose, but no clear objective, goal or outcome. They may be more or less interesting, go longer, include multiple perspectives, but it doesn’t really improve per se. Yet, conversation is one of the most important ways we communicate with each other. DE works with programs that are like conversations: multi-faceted, complex and adaptive.
Below is a table that provides examples of a program improvement and a program development.

<table>
<thead>
<tr>
<th>Program Improvements</th>
<th>Program Developments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Add a new topic to a training curriculum</td>
<td>1. Change the scope, sequence and delivery of curriculum to a new target group</td>
</tr>
<tr>
<td>2. Provide staff training to enhance the skills of current staff</td>
<td>2. Change the job descriptions and reconceptualize the priorities, qualifications, and needed competencies of staff</td>
</tr>
<tr>
<td>3. Expand the recruitment effort to a target area</td>
<td>3. Fundamentally change the recruitment strategy, for example, instead of direct advertising working through referral agencies</td>
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<tr>
<td>4. Expand the staff to serve increasing numbers under the same basic model</td>
<td>4. Expand staff to change the staff-participant ratio, providing a more personalized and richer experience for users</td>
</tr>
<tr>
<td>5. Fine-tune the program delivery based on participant feedback</td>
<td>5. Replace one type of training with a different type altogether</td>
</tr>
<tr>
<td>6. Add more content to a presentation or information form</td>
<td>6. Change the way your audience interacts with the existing content, make things more interactive</td>
</tr>
</tbody>
</table>

**Adapted from Patton (2010, p.40)**


These examples illustrate how programs oriented towards development consider options that go beyond “tinkering” with an existing structure in response to data, toward adapting the very structure of the program itself to suit changes in the conditions resulting from the evaluation.
4. Metrics & Methods

Reflective Practice
Ethnographic Methods
Network Analysis
Traditional Website Metrics*
Evaluation Designs
Reflective practice can be used on its own or as part of a Developmental Evaluation and involves paying attention to the regular patterns of behaviour and considering it in light of theory. Reflective practice works well in novel situations where there is an interplay between activity and learning in practice and less reliance on formal training. As most public health practitioners have little training in social media and, given that the evolving nature of the conversations and rhythms are so dynamic, there is little formal “expertise” that can be applied to social media. Reflective practice, when applied with other methods, facilitates pattern recognition as well as supports greater alignment of the social media activity with strategy.

At its core, reflective practice is about paying attention and considering what is being seen and experienced in light of professional experience, current social trends and theory. It is an adaptive and integrative method that can be applied along with other methods described in this guide.

Social media creates a culture in each setting in which it is deployed. There is a culture that takes place on a Facebook page, a Twitter feed, and through a YouTube channel. This cultural space is therefore highly amenable to evaluations that draw on research methods that focus on culture like ethnography. Specifically, observation and conversation analysis are two of the methods highlighted within ethnography.

Observations can include:
- Number of posts
- Nature and content of those posts
- Number of replies or use of a hashtag (#)
- Nature and content of those replies
- Content source (e.g., video, audio, web link)
- Time and date of post
- Relation between the posters or referrers to one another (e.g., users are cross-listed)
- Relation of posts to one another (e.g., cross-posting from other platforms)
By observing what people post, when they post content, and what kind of content they post, it is possible to develop a profile of activity and correlate that with social media campaign activity.

Social media operates in an environment that is highly transparent in its content creation and delivery. Conversations can be monitored and actively analyzed in real-time. One of the foci for evaluating conversations is the inclusion of rich conversations. These are conversations where there is value being added by more than one person, usually through an interaction (back-and-forth) in the conversation.

A second criteria is to use the amount of effort required for an action to guide its potential impact. Perhaps the best example of this is Barack Obama’s election campaign website and app (new and old) which seeks to gauge the strength of commitment of users to the cause through their social media campaign. The app provided a set of tools to help people support the campaign and awarded points based on the amount of effort required by each task. Thus, forwarding a link to someone was awarded fewer points than when they used the app to create and organize a campaign event. Taking a photo or producing a video and uploading it requires more effort than commenting on it.
The activity / effort principle holds true for any
campaign. Not all activities are created equally
and those activities that require greater effort are
more likely to produce the kind of commitment
that will lead to improved retention of information,
greater learning, and a higher likelihood of action.

Another strength of the approach of rewarding or
recognizing effort is that there is the opportunity to
have your data verified, by observing interactions
between people.

Reference: Laurel, B. (Ed.) (2003). *Design research: methods and

*Harfoush, R. (2009). Yes we did: An inside look at how social
Social network analysis (SNA) encompasses a set of methods that look at the number and nature of connections between actors within a system. This system could include activity on a website, across multiple platforms, or shared connections both online and offline. SNA seeks to map the connections usually through observed links or self-reported data. Typical questions of a SNA approach to participants include:

- Who are the people you interact with on this [network, topic etc.]?
- How well do you know this person / these people?
- What is the level of influence they have on your [knowledge, behaviour, etc.]

Dimensions like relevant demographic (e.g., education, age, sex/ gender) and location data are often asked as well.

The aim is to determine the size, shape and composition of the network. This can be done as a descriptive activity or conducted over time to monitor shifts in network characteristics. Qualities like centrality (how close one is to the centre of the network), connectedness (the number of connections a person has), density (the average number of ties that a person in the network has) and composition (what kind of actors are in the network) are some of the key measures of networks.
Some examples of social network analysis programs include:

http://www.analytictech.com/ucinet/
and http://nodexl.codeplex.com/

Social network analysis is often performed using sophisticated software such as UCINet. There is also a free add-on for Microsoft Excel called Node XL which is effective at producing high-quality data outputs and visuals.

For more simple analysis, try using sticky notes and literally map out the links between social network users. One can look at the connections between individuals based on their status as “friends” or as “followers”. From that, one can map and see who is connected to those connections and literally map out a network. This map can be compared before the start of a program, during, and after a program is finished to assess what kind of changes take place during the course of a social media intervention.

Traditional Website Metrics

Although social media is different from other forms of electronic media, the same data can be collected and used to inform an understanding of the impact of an intervention. Social media activities hosted on a site under your control provide you with the opportunity to collect data using the standard web analytic tools available from the server software. These statistics will include the ability to determine:

- Number of visits
- Length of visit
- Pages visited / content viewed
- Referring sources
- Method of access (including mobile browsers)

Another way to collect these statistics from sites that you do not control / own is through the use of tools like Google Analytics.

Google Analytics is a free service that provides background usage statistics on a variety of metrics related to your website. It can tell you how many visitors your website gets, where they are from, how long they stay, and how they got to your site among other traffic statistics.
Screenshots from Google Analytics

Enterprise-class web analytics made smarter, friendlier and free.

Google Analytics is the enterprise-class web analytics solution that gives you rich insights into your website traffic and marketing effectiveness. Powerful, flexible and easy-to-use features let you see and analyze your traffic data in an entirely new way. With Google Analytics, you're more prepared to write better-targeted ads, strengthen your marketing initiatives and create higher converting websites.

Google Analytics Product Tour

News & Highlights

- Google Analytics Site Search
- Google Analytics in the API
- Google Analytics & the Enterprise
- Google Analytics & Mobile

Strategic Solutions

- Expand the power of Google Analytics with these third-party solutions in our Analytics Application Gallery

Traffic Sources Overview

- Direct Traffic: 210.00 (51.34%)
- Search Engines: 105.00 (25.67%)
- Referring Sites: 94.00 (22.98%)

Content Overview

<table>
<thead>
<tr>
<th>Pages</th>
<th>Pageviews</th>
<th>% Pageviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>/home</td>
<td>234</td>
<td>21.93%</td>
</tr>
<tr>
<td>/contest/</td>
<td>77</td>
<td>7.22%</td>
</tr>
<tr>
<td>/home/index</td>
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<td>5.72%</td>
</tr>
<tr>
<td>/home/login</td>
<td>81</td>
<td>5.72%</td>
</tr>
<tr>
<td>/home/blogs</td>
<td>42</td>
<td>3.94%</td>
</tr>
</tbody>
</table>

view report
Screenshots from Google Analytics

Visitors Overview

100.00% of total visits

Overview

14 people visited this site

- 15 Visits
- 14 Unique Visitors
- 15 Pageviews
- 1.00 Pages/Visit
- 00:00:00 Avg. Time on Site
- 100.00% Bounce Rate
- 86.67% New Visits

93.33% New Visitor
14 Visits

6.67% Returning Visitor
1 Visits
Can you employ traditional methods of evaluation – surveys, focus groups and key informant interviews – with social media? The answer is yes and no. The constant change and developmental nature of social media environments means that there is a limited amount of control for the evaluators, which changes the utility of many traditional methods of evaluation. Methods and designs that require high-levels of standardization and control are often ill-suited to social media environments, particularly randomized controlled trials.

Much of the study designs that work well come from fields like anthropology, sociology and design. Methods that have flexibility such as qualitative interviewing can be useful for exploring the user experience and understanding what kind of influence conversations using social media have on perceptions, knowledge or activity. Quantitative methods such as surveys can be useful if they are collected and analyzed quickly and placed in appropriate context. One of the challenges with survey data and social media is that the references to the environment in which dialogue takes place changes quickly and that without proper contextual data, the findings may be difficult to interpret.

Regardless of the methods you employ, the emphasis on utilization of findings is critical, otherwise the data will have little meaning when presented outside of its context. Social media metrics are not amenable to high-level planning unless used to guide strategy.

5. Integrating Evaluation with Strategy

Evaluation efforts are most effective when they are integrated into strategy, particularly if a Developmental Evaluation approach is used. By linking evaluation with strategy it is more likely that an evaluator or program leader will be able to make sense of the data. For example, if a strategy is using multiple platforms to engage an audience and encouraging “cross-platform” conversations (e.g., someone posts a campaign video from YouTube on the campaign’s blog).
There are three principal orders in which eHealth interventions fall, largely due to the way that they are organized to support behaviour change or health communications:

**The first order** is stand alone, whereby the social media intervention is designed to operate independent of any other communication activity. Here, strategy is designed for the particular tool or tools online and there is no specific, purposeful, strategic links to other campaigns in other media.

**A second order** strategy is where the social media activities complement work being done in other sectors, perhaps offering an audience a different way to engage, but generally the purpose and strategy are complementary. This can take place across social media settings as well as beyond social media to other areas. For example, an audience could engage with Twitter and Facebook on similar issues, with similar conversation threading across both media. Or, your organization can provide a way to interact with social media to complement work being done in clinics, or schools or other areas where there is some form of dialogue and conversation.

**A third order** strategy involves embedding social media into other activities. In this case, both offline or other online media are used in conjunction with social media tools.
**First Order Stand alone**

A First Order strategy relies on social media messages as the sole-source of engagement with your audience. The strategy may be aligned with other activities, but its execution is independent of other activities being conducted. This could include Facebook contests, Tweet-ups, or YouTube video contests.

To take an example, consider the use of Twitter as part of a social media strategy. One option for evaluation is to use a **hashtag** to convey particular information and track a message. Use of a hashtag to denote something is an informal way to allow you and the Twitter community to track and follow the discussion about a particular topic or event. For example, if you are looking at the discussion on quitting smoking, you could consider using the hashtag: #quitsmoking

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**South by Southwest** is among the largest combined social media, music, arts, and film festivals in the world. For promotion of the event on Twitter, festival goers use the hashtag (#sxsw), allowing anyone to follow what kind of activities are happening at the festival. From an evaluation perspective, this is user-generated data that could be examined for themes and trends.

Another strategy is to examine the number of times that a message has been **re-Tweeted**. Many re-tweets (RT’s) mean that others think the message is important enough to share. It also extends the reach of your message to people outside of a normal network.
Second Order Complementary

A Second Order strategy uses social media to complement existing activities that are being done as part of a larger campaign. This might mean using Facebook to distribute a link to a new toolkit on your organization’s website or uploading a video of a training that is held at community centre.

For a second order intervention, there is a need to maintain focus on at least two different strategies being employed. One example is the use of Facebook and YouTube together. The strategy may involve having content posted to Facebook and YouTube in different formats. An evaluation strategy might involve:

• Comparing the traffic to both sites in terms of the number of visitors
• Exploring the type, nature and amount of posts presented on both sites and the comments
• Counting the number of cross-posts (e.g., links to YouTube videos on Facebook, or links to Facebook group on YouTube)
• Examining the data to see if anyone on the Facebook group or list of “likes” is also subscribing to updates from the YouTube channel
The Old Spice Campaign of 2009-10 featuring “The Man Your Man Could Smell Like” was an example of how a second order intervention could work. In this campaign, similar messages were sent out via Twitter and YouTube, allowing them to complement one another and build on one another to the point where the campaign eventually led to an integrated campaign where YouTube videos were shot with an actor responding to questions that were sent via Twitter.

For a brief summary of the campaign and its effect from a marketing and social media standpoint, see the following links:


Third Order Integrated

A Third Order strategy involves embedding social media into other activities. This could include a tobacco-free rally at city hall, where participants tweet messages to their peers to enlist their support and advocate policy makers. In this case, both the offline or other online media are used in conjunction with social media tools.

The strategies for evaluation of a third-order intervention could combine elements of the previous examples, but will require more detailed data collection. Observations across the various channels will be necessary, including potentially interviewing (in person or remotely via the Internet) members of the community. It may be worth using tools like social networking to determine the type of networks that are created and maintained through the use of multiple platforms and to consider the total number of social media channels that are being used to connect people (e.g., do people connect to each other through one, two or more channels?).

Tools that can help evaluate third order interventions (first or second order ones too) will be covered in the next section called the Social Media Evaluation Tools.


There are some unique, idiosyncratic qualities to certain Social media tools that are worth mentioning in terms of their use in evaluation.
There are particular aspects to each tool that are unique, or used largely by one or two media:

**Check-ins:** Tools like Foursquare are geolocation-centred, allowing users to “check-in” at particular locations. Facebook has recently introduced its Places program for Facebook mobile, which uses a similar system to enable users to say where they are and make it their status update. The number of check-ins, their frequency, and the characteristics of those who check in are all points to consider for evaluation.

**Hashtags:** These are largely used with tools like Twitter, but have also been adopted less formally in Facebook and other blog posts as a means of highlighting a particular trend or activity. Hashtags allow message threads to be tracked throughout the “Twitterverse”.

**Likes:** This is a Facebook exclusive. The “like” button is designed to show that someone supports an idea or comment on Facebook and has recently been added as an option for website developers so that people can “like” content on a site other than Facebook. This “like” will be reflected on a person’s personal Facebook page. The number of Likes and the type of content that is “liked” provide potentially useful information for evaluators.

**Followers:** Unlike Facebook and Foursquare, Twitter uses followers. Anyone can follow anyone else (unless a person has privacy settings engaged to restrict followers). Thus, an account could attract upwards of hundreds or thousands of followers. Celebrities such as Lady Gaga have millions of followers. The number and change in followers is a metric to consider using in evaluation as is the type of follower (e.g., organization, individual etc.).
**Friends:** Facebook and Foursquare use the “friend” system and for organizations, the number of friends indicate the size of the network or community that the organization or individual has immediately available to them and to whom their messages go out to. The amount and change in the number of friends can be a metric to consider in evaluation.

**Subscribers:** Blogs and sites like YouTube use subscribers, which is akin to the Follower or Friend in other social media. Subscriptions refer to when a person has opted to receive updates through email or some other means about when new content is made available. Shifts in subscription numbers and details on the individuals who subscribe can be useful information to an evaluator.

**Geotagging:** Photos, Tweets and videos can be geotagged, meaning that there is a small amount of information about where the update/post was made attached to the content. In the case of pictures on Flickr, this could mean revealing the location of where the photo was taken. Geotagging content enables evaluators to determine the time, date and location of where an event took place.
Views: For video sites, the number of views that a video has had is an indicator of overall reach. This number calculates the amount that the video has been streamed to a computer, but does not necessarily inform about how many viewers saw the video as a video could have many people watching the same screen.

Identity Tracking Tools: Entire sites devoted to keeping “score” of your influence have emerged. Websites such as Klout, PeerIndex, and Crowdbooster all collect data provided from your Twitter, Facebook, Foursquare and other accounts (with your permission – you must consent to having your social media provider release this information to the metric service) to aggregate the overall strength of your network.

These tools use almost real-time calculations to determine your identities’ reach, influence and overall impact.