Jive Market Engagement

Contents

Jive Market Engagement......2
- **Getting Set Up**......2
  - Enabling the Social Media Console......2
  - Managing Market Summary Visibility......3
- **Managing Roles and Markets**......3
- **Working with Markets, Observations, and Viewpoints**......5
  - How can I use markets?......5
  - How can I use observations?......6
  - How can I use viewpoints?......7

Jive Market Engagement

Jive Market Engagement provides a place specifically designed to help you collect market research and collaborate to generate value from it.

Note: This is an optional feature available as a module. For more about modules, see *Adding Features with Modules*.

Getting Set Up

Setting up Jive Market Engagement includes getting and registering the feature software. After you've got it running, you'll start assigning the roles needed to manage it.

To get going with market engagement, you'll first need to:

- Get the Jive Market Engagement plugin. The plugin adds the feature functionality (though you'll still need the license to use it). For more about downloading the plugin, contact your sales representative. Once you have the plugin, you'll find information about installing it in *Adding and Removing Plugins*.
- Apply a deployment license that enables you to use the feature. For more about managing licenses, see *Managing the Deployment License*.
- Register to use the Social Media Console. When you received a license that support Jive Market Engagement, you also received information you can use to gain access to the Social Media Console included with Jive Market Engagement.
- After the feature is running, you'll likely want to begin assigning community members to administrative roles that will allow them to create markets, delegate to market experts, and so on. For more information, see Managing Roles and Markets (page 3) .

After you've got Jive Market Engagement running, you'll want to create a presence for your team in the application.

Enabling the Social Media Console

The Social Media Console is another application connected to your community. A social media expert launches the Console from within market-related UI, such as the Market Summary page or a page related to a specific market.

Note: For more on roles such as social media expert and market expert, see Managing Roles and Markets (page 3) .

You can configure communication between your community and the Social Media Console application by using the Jive SBS admin console. Note that this feature of the admin console will be available only if you have a valid license that supports the Jive Market Engagement feature.

In the UI: Admin Console: Marketing and Sales > Setup > Market Engagement

When you received your license, you should have also received a customer ID and shared key. You use these to configure a connection between your community and the Social Media Console (which is a separate application). Along with these you'll need to enter the URL at which your community can be reached by REST web services calls from

Enter the information in the boxes provided, then click Test to confirm communication with the Social Media application. After a successful test, click Save to save your settings.

Setting	Description
Customer ID	An unique identifier for your community.
Shared Key	A password of sorts for access to the Console.

Setting	Description
Endpoint URL	The URL at which this community can be reached by the Console.

Managing Market Summary Visibility

The Market Summary page lists and provides access to all of the markets in the community. Be default this page is displayed as a tab along with tabs for the All Content and Your View pages -- in other words, it can be the first thing people see when they log in to the community. You can set which community members this page is displayed for. For example, you might want to restrict page access to a user group made up of people in the community who do market-related work. For others, the Market Summary tab will not be visible.

Note that access to the markets themselves is specified separately. Market access is determined by permissions set for the place (such as a space) the market is in.

You can set access to the Market Summary page from the admin console.

In the UI: Admin Console: Marketing and Sales > Setup > Market Summary Access

To set access for the Market Summary page, in the admin console go to the Market Summary Access page.

1. On the page, under **Groups with access**, assign permissions to user groups:
    - To assign permissions to a user group not yet listed:
        a. Click **Add group**.
        b. Enter the name of the user group to add.
        c. Click the **Add Group** button.

Managing Roles and Markets

A market administrator creates markets, assigning market experts and social media experts to collect and analyze content in them. When a person is an expert, their profile lists the areas in which they're an expert. For example, imagine someone is a market expert for three markets. Their profile will list each of their expert roles, providing links to those three markets.

Here's a description of each of those roles:
- Market administrators create markets and manage the list of social media experts and market experts.
- Social media experts have access to the Social Media Console. Using the console, they monitor the web for key terms and searches. They collect their findings as observations.
- Market experts manage a market (although they don't create them). They can be responsible for creating create observations to capture the data they notice. They also create viewpoints to synthesize analysis from thoughts and observations.

Market Administrator

A market administrator is the principal administrator for markets. They create markets, assigning and managing social media experts and market experts.

An administrator with Full Access or Manage System permissions can assign the market administrator role by using the admin console. (For more about permissions, see *Managing Administrative Permissions*.)

In the UI: Admin Console: Marketing and Sales > Setup > Market Administrators
To assign the market administrator role to people, use the following steps:
1. In the admin console, go to the **Market Administrators** page.
2. To select a person:
    - Type their name in the box provided and click their name when it is listed.

- Click **Select People** to browse for the person, select the check box for the person you want, then click Add Selected People.

You can remove a person by clicking the **Remove** button corresponding to their name.

Market Expert

A market expert manages a market (although they don't create them). They can be responsible for creating create observations to capture the data they notice. They also create viewpoints to synthesize analysis from thoughts and observations. (See Working with Markets, Observations, and Viewpoints (page 5) for more.)

Among the things that market experts do are:

- Create observations.
- Research and author viewpoints.
- Define and manage categories.

To assign the market expert role to someone, use the following steps:

1. In the end user UI, go to the market to which you want to assign a expert.
2. Under **Manage**, click **Manage market experts**.
3. To select a person:
   - Type their name in the box provided and click their name when it is listed.
   - Click **Select People** to browse for the person, select the check box for the person you want, then click **Add Selected People**.
4. Click **Close** to close the dialog box.

Social Media Expert

A social media expert has access to the Social Media Console. Using the console, they monitor the web for key terms and searches. They collect their findings as observations. A social media expert will likely have a very active role in collecting information from web-based resources such Twitter and other sites.

Note: Your license might put a limit on the number of people who can be social media experts.

To assign the social media expert role to someone, use the following steps:

1. In the end user UI, go to the **Market Summary** tab.
2. Click **Manage social media experts**.
3. To select a person:
   - Type their name in the box provided and click their name when it is listed.
   - Click **Select People** to browse for the person, select the check box for the person you want, then click **Add Selected People**.
4. Click **Close** to close the dialog box.

Markets

Markets are places to focus research, analysis, and conversation related to an area of the more generic kind of market. Markets provide a way to collect information and collaborate around it -- whether the information is from a community or the larger Web.

Only market administrators can create markets. A market inherits its permissions -- who can see them, contribute content, and so on -- from the place the market is in (such as a space).

To create a new market, use the following steps:

1. Click the **New** menu, then click **Market**.
2. On the **Create a new market** page, enter the following:
   - A name for the market. The text you type here will be used to create the URL at which the market can be reached with a browser (although most people will just use links in the user interface).
   - A description. This should be something that makes it easy for people to know what your market is about.

- Tags. Type words (separated by spaces) that help to categorize the market. People can use tags to filter their searches when they're looking for content and places.

3. Browse for an image to represent the market. This will be displayes on the market's home page, as well as in pages that list the market among other content and places.
4. Select check boxes for features the market should have. By default, these include observations and viewpoints, which are essential to making a market useful. But you might want other features as well -- will documents and blog posts be useful in the market, for example?
5. When you're finished, click **Create market**.

After you've created the market, you're not quite finished until you've assigned one or more market experts to keep it going. (You could be the market's expert, of course, in which case you don't need to do anything more.) For more information, see the "Market Expert" section.

You can also delete a market. When you do, you delete all of the content inside it and remove any associations -- roles assigned to people, notifications, and so on -- that are specific to the market.

Working with Markets, Observations, and Viewpoints

The tools provided by Jive Market Engagement include a few features not found in other parts of the application. These are specifically designed to support market research and collaboration around it.

Here's a list of the main pieces:

- Markets -- Places to collect and synthesize market research with a context that makes it easy to discuss the information there. In markets, you create observations to capture research, then create viewpoints to analyze and synthesize observations into value related to the market.
- Observations -- Links or text that represent pieces of research related to the market. Observations tend to be narrow in scope, such as a link to a Twitter post or piece of community content, or simply a note of text.
- Viewpoints -- Longer content that usually collects observations to support an analysis or synthesis of information. Viewpoints are an opportunity distill those bits of information you've gathered into something solid and valuable enough to suggest action.

As with other kinds of community content, observations and viewpoints invite response and collaboration. People can comment on them, link to them, and so on. If they're set up for it, markets can also contain discussions, documents, videos, and other of the common content types.

How can I use markets?

A Jive Market Engagement market is a place to focus research, analysis, and conversation related to an area of the more generic kind of market. Markets provide a way to collect information and collaborate around it -- whether the information is from a Jive SBS community or the larger Web.

Here are a few ideas for market focus:

- A market demographic
- A brand
- A geographic region
- A competitor

In markets you can:

- Create observations to capture information you find while doing research.
- Create viewpoints to collect observations with your views about what they might mean.
- Create other kinds of content (if your market supports them), such as documents, discussions, and so on.

As with other places -- including spaces, projects, and social groups -- people can follow a market and receive email notifications about activity in a market. Here are some of the reasons why they might want to:

- Observations in the market capture information from the "Web sea" they might never have noticed before.

- The market's viewpoints offer insights that suggest specific direction for action related to the market.
- Comments on content in the market give them a sense of how others view the information. Out of this awareness arises conversation and new ideas.

How can I use observations?

You create an observation to capture market-related information. An observation is typically a small note or a link to some other resource. It can come from:

- Other content inside the community.
- A bridged community.
- The Web.
- A Twitter post.
- Stand-alone text.

After you create an observation, it becomes visible on the Observations wall on the market's Overview page. People can comment on the observation, adding their own perspective.

Note: For at-a-glance views of observations, be sure to check out the following widgets when personalizing your home page: Recent Observations. For more on personalizing, see *Designing Pages with Widgets*.

Creating an Observation from Inside the Community

To create an observation, use the following steps:

1. On the **New** menu, click **Observation**.
2. In the **Choose Location** dialog box, click the market where you want to create the observation.
3. Click the tab for the kind of observation you want to create:
    - **Note** -- Simply type some text.
    - **Link** -- Enter a URL, linking to a web site or a community page. You can also type a note to go with your link, such as a description of why you thought it was interesting.
    - **Twitter** -- Enter a Twitter link or the user ID of a person with a Twitter account. You can also type a note to go with your link.
4. Click **Apply Tags and Categories** and enter a set of tags (separated by spaces) that help to categorize your observation so it can be more easily found later.
5. Click **Create**.

Creating an Observation from the Social Media Console

Creating viewpoints from the Social Media Console is an easy way to get items you discover as part of your research into a market. Observations you create this way carry the information you supply into the market in your community, The console item is inserted into the observation.

Note: The Social Media Console is available to market experts who are also assigned as social media experts.

To create an observation, use the following steps:

1. On the **Market Summary** page, click **Launch Media Console**.
2. On the **Dashboard**, display the widget from which you want to create an observation. You can create observations from Conversation Clouds, Topic Analyses, Topic Trends, River of News, or Influence Viewer.
3. Hover your mouse pointer over the widget, then in the widget's lower right corner, click the **Create Observation** button (it looks like an asterisk).
4. In the **Create Observation** dialog box, under **Note**, type any note text you want associated with this observation.
5. Under **Add to Market**, select the market to which you want to add the observation.
6. Under **Categories**, you can select the categories (if any) that you want to apply to the observation.
7. To associate the observation with an existing viewpoint, select the **Add Observation to Draft Viewpoint** check box, then select the viewpoint from the list.
8. Click **Save**.

How can I use viewpoints?

With viewpoints you can pull together information you might have collected through observations and other data. A viewpoint is where you suggest an analysis or synthesis of the research you're finding and capturing. A viewpoint adds value to the research referencing relevant items as a citation or a preview that quotes from the observation. After you publish a viewpoint, other people can comment on it, weighing in with agreement or alternative views.

Here are a few ideas for making the most of viewpoints:

- Use a viewpoint to express something about the market, inserting or associating observations that support your assertions.
- Moving from the other direction, when you notice trends in the observations you've collected, you can use a viewpoint to describe the trends, associating the observations themselves. This kind of analysis can add value to the research.
- When you create or notice observations that seem related to a viewpoint that already exists, you can associate those observations with the viewpoint.
- Comment on observations or viewpoints you read in the market. The viewpoint can become a focal point for conversation about the research or assertions related to it.

You can start out by creating a viewpoint in a draft state. Then, before you publish it (in other words, before it's visible to others), you can continue to add research.

Note: For at-a-glance views of viewpoints, be sure to check out the following widgets when personalizing your home page: Popular Viewpoints, Recent Viewpoints, and Your Unpublished Viewpoints. For more on personalizing, see *Designing Pages with Widgets*.

Creating a Viewpoint

To create a viewpoint, use the following steps:

1. On the **New** menu, click **Viewpoint**.
2. In the **Choose Location** dialog box, click the market where you want to create the viewpoint.
3. Under **Create a New Viewpoint**, type a title in the top box.
4. You can start adding your ideas as you would other kinds of content.
5. Associate observations with the viewpoint:
    a. Click **Browse All Observations**.
    b. Search or browse for observations that fit with the perspective or synthesis you're intending with the viewpoint.
    c. For each observation, you can either insert the observation inline with the text of your viewpoint or you can associate the observation as a reference that accompanies the viewpoint.
        1. Click the **View & Insert** button.
        2. Under the observation preview, click **Insert Observation** or **Add Post to References**.
    d. When you're finish associating observations, click **Close**.
6. Attach files if you like.
7. Under **Tags**, type tags (separated by spaces) to help categorize the viewpoint.
8. Save the viewpoint if you want to keep working on it before others see it; publish it if you're ready for feedback from others.