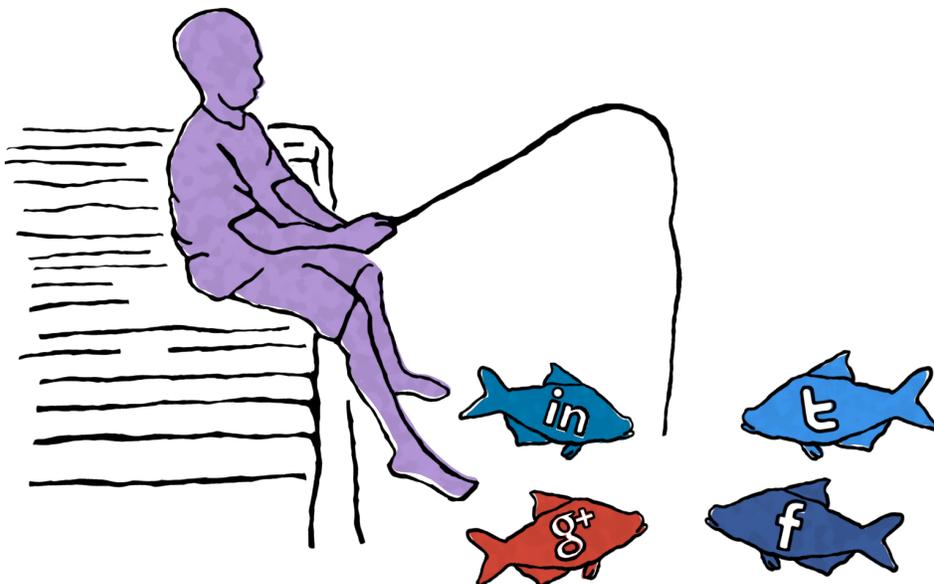


# THE IMPORTANCE OF THE BOOLEAN SEARCH QUERY IN SOCIAL MEDIA MONITORING TOOLS

# CONTENTS

The Importance of the Boolean Search Query in Social Media Monitoring Tools .....	1
Abstract .....	4
What Are Social Media Monitoring Tools Used For? .....	5
Monitoring and Listening .....	5
Analysis and Intelligence .....	6
Social Media Objectives.....	6
Industry Trends.....	6
Monitoring Competitors To Gain A Competitive Edge.....	7
Content Curation .....	7
Targeting Influencers .....	8
Reputation Management .....	8
What Is A Social Media Monitoring Query? .....	9
Variations of keywords to search .....	10
Filters.....	12
Basic Boolean Search Operators.....	12
OR.....	13
AND .....	14
NOT.....	15
Advanced Boolean Search Operators .....	16
Quotes - "" .....	17
Grouping with Parentheses - ().....	18
How Parentheses Change Search Results.....	20
Using Parenthesis to Combine Tasks .....	22
Wildcards and Truncation - *, ?.....	22
Truncation Wildcard - * .....	22
Single Character Wildcard - ? .....	23
Proximity with ~ or NEAR .....	24
Why Many Social Media Monitoring Tools Are Inadequate .....	26
Boolean Search Query User Interface .....	26
Reducing Irrelevant Results .....	28
Additional Search Operators You May Need .....	28
The Key to Success .....	31
Social Media Monitoring Tools Comparison Case Study.....	32
Variations And Permutations Of The Brand Name .....	33
Method 1: Massive Query Using the OR Operator.....	34
Method 1 Using Brandwatch- 149 Results .....	35
Method 1 Using Fresh Web Explorer - Character Limits.....	36
Method 1 Using Mention – Too Many Keywords .....	36
Method 2: Complex Boolean Query .....	38
Method 2 Using Brandwatch – Trial and Error Tweaking .....	38

Why would we want to use NEAR instead of just AND? .....	39
Method 2 Using Fresh Web Explorer – Parentheses Problem.....	42
Method 2 Using Mention- User Interface Limitation .....	42
Refining The Social Mentions Results .....	43
Date Range .....	43
How Often is Data Collected?.....	43
Setting Criteria Based on Dates .....	44
Brandwatch .....	44
Fresh Web Explorer .....	45
Mention.....	45
Domain/URL Inclusion or Exclusion.....	45
Brandwatch .....	46
Fresh Web Explorer .....	46
Mention.....	46
Sources of Data .....	47
Brandwatch .....	47
Fresh Web Explorer .....	47
Mention.....	49
Geographic Location.....	49
How Does the Tool Determine the Location? .....	50
Additional Keywords .....	51
Language .....	51
Other Social Media Monitoring Software Features To Consider .....	51
What do You Need the Tool For?.....	52
Factors to Consider.....	52
Conclusion .....	54
About The Author .....	55



# Abstract

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There are many social media monitoring tools available and it is hard to choose software that will best fit your needs. One feature that is often overlooked in product data sheets or reviews of social monitoring tools, is how robust the functionality is that sets the criteria for which social mentions to collect. A tool with a powerful Boolean search query feature will provide not only flexibility for varied types of monitoring, but allows precision that saves time and money from not having to waste effort to weed through irrelevant results. This paper will help you understand Boolean search terms, show some social media monitoring tool comparisons of how they implement their query of social mentions, and how important they are to effective social media monitoring.

# What Are Social Media Monitoring Tools Used For?

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Social media monitoring tools are plentiful, each one of them with different strengths and weaknesses, specialties, targeted customers, and varied pricing. There are so many choices it can be hard to choose which tool will work best for your company or marketing agency. We've done quite a bit of research and tool testing and wrote a blog post [comparing various social media tools](#). This paper's intent is not to do a thorough social media monitoring tool comparison of features, but to focus on one area which is possibly the most important and often overlooked, when deciding which tool will work best for your needs: the Query.

First let's take a quick look at what social media marketing tools are used for. At the highest level, they are used to monitor conversations and mentions on specific types of websites and help the [social media marketing team plan and manage](#) their activities through them. Some tools only focus on monitoring social media sites like Twitter and Facebook. On the other end of the spectrum are enterprise level data mining research tools that will scan everything on the internet, including blogs, forums, message boards and news articles. Depending on what your objective is, the results you find when monitoring the web can help you determine what people are saying about your services and products (or your competitor's services and products), gauge their sentiment, find out how the products are being used, look for opportunities for new customers, or follow industry trends or key influences. Some social media monitoring software is great not just for collecting the data, but analyzing it and creating graphs and reports to help you understand the data quickly.

## Monitoring and Listening

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Most social media monitoring tools start off with a **monitoring** phase, which is setting up what you want to monitor. Each tool has different ways of specifying what brand names, terms or any other combination of words you want to search for. Some tools have a vast database of historical information they search on, others search in real time, and some may make you wait while they compile the results. The aggregation and filtering of the results enables **listening** to see what people are saying about your brand.

## Analysis and Intelligence

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After the data is gathered, some tools provide ways to analyze the data and generate reports showing such things as popular topics, sentiment, top authors or demographics. Some tools provide indepth social intelligence. The results are analyzed to a degree where they can provide business insights and recommend actions.

There is a wide variety between the tools on their definitions of what entails monitoring, listening, analysis or intelligence, and how indepth the analysis is and how many types of reports are offered.

## Social Media Objectives

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What do we expect to gain from social media monitoring and listening? There are many reasons why it can help your business and see what people are saying on social networks, blogs, forums and other places on the internet. When the tool meets your requirements, it can quickly become an integral part of your [social media process](#). When it doesn't fit the bill, the tool will likely be unused and a waste of money. Ric Dragon, author of the [book Social Marketology](#) and founder of DragonSearch, thinks the ideal social media management tool does not exist yet.

“*Social media is still a relative newcomer in the world of media, and doubtless, the tools will be developed. The most important concern in developing those tools is designing them in such a way that they answer the right questions – as opposed to having to develop questions to fit the tools.*”  
Social Marketology by Ric Dragon

## Industry Trends

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To monitor the trends or look for opportunities, a company may want to monitor industry terms or news of the geographic area or industry. For example, a producer of organic foods may want to look for news and trends in the popularity of organic food for targeting a geographic area to market their products to, or to see which types of foods people prefer to buy in organic form.

## Monitoring Competitors To Gain A Competitive Edge

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Monitoring of competitors' names, products or reviews can help find opportunities to grab their market share or learn what is working for them. For example, you could search for mentions of your competitor's brand or product names and see what the public sentiment is about them. Complaints and shortcomings could be opportunities for you.

There is a story about how social media author, [Dave Kerpen](#), tweeted about how frustrated he was in line to check into a Las Vegas hotel. A competitor of the hotel was monitoring tweets about that hotel and sent him a sympathetic (and non-promotional) tweet. Next time he was in Las Vegas, he booked his room at the competitor's hotel, and recommended it to a friend who booked 20 people from his wedding party there.

Monitor your competitors and see what people are saying about their latest products and services. Observing what they can improve upon gives you valuable information that you can apply to your own products. Look for buzz about anticipated new products, and possibly get a head start reading leaked news about upcoming features so you can react with features in your own product line. Find out what they offer and use that information to help you [determine your unique value proposition](#).

See what your competitors are using for [content marketing](#) and which methods were successful and generated the most buzz. If you share the same market audience, those approaches could work for your business as well.

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Monitor your competition to find opportunities.

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Engage in conversations. Perhaps your company could get involved in a social media discussion where people were complaining about your competitor's brand and make a good showing contributing positively to the conversation.

## Content Curation

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Companies that participate in social media are always looking for [relevant content](#) to share with their followers on social networks. Monitoring is a good tool for finding interesting content, whether it is a local business searching for local news and events, or a solar energy company looking for the latest news supporting conversion to solar energy. While monitoring a specific news topic, industry or new product, you can observe how much engagement it is creating, and gauge the sentiment to help target what your audience is interested in reading about.

## Targeting Influencers

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An important part of digital marketing is finding out where your target audience is on social media [and finding contact information and a way to engage the key influencers](#) who can serve as brand advocates and niche promoters. The analysis functionality of a social media monitoring tool can analyze mentions of your brand and produce statistics on the authors of those mentions. This way you can easily get a summary of who are the top people with the most followers who are discussing your brand. Some tools provide a scoring method, like the [Klout Score](#), to rank the authors who have the most reach and largest networks, or use of website scores like [MozRank](#) to determine if the influencer's site is credible. Monitoring can help find the passion groups for your brand or topic area, and help gauge the size of that target audience.

## Reputation Management

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Social monitoring is also valuable for [online reputation management](#) and to gauge the sentiment of customers. Many social monitoring tools provide some analytical functionality that assigns each social mention a sentiment of positive, negative or neutral. Finding negative reviews or comments from unsatisfied customers provides an opportunity to provide a timely response for damage control and demonstrate superior customer service.



## Variations of keywords to search

---

One area that can't be forgotten when building a query for social monitoring is variations in the way keywords could be expressed. Take the time to think about what you want to monitor and the various ways of expressing those keywords, brand names or terminology.

Some examples of variations are:

— **Plurals** - Not all tools may accommodate variations in singular and plural keywords.

— **Multiple words to describe the same thing**

- Monitoring a product like *blue jeans* may require thinking about how people describe types of blue denim pants – for example, *jeans, pants, slacks, denim, flares, dungarees, jeggings...*
- A *doctor* could be referred to as a *doctor, physician, doc, Dr., etc...*
- A *lawyer* could also be called an *attorney*.
- *America* can be expressed as *America, United States of America, United States, The States, US, USA, U.S.A., U.S.* or even *U.S. of A.*

— **Abbreviations**

- Sometimes a brand or product name is abbreviated, like *IBM* for *International Business Machines*, or *Corp.* for *Corporation*.
- Locations can be abbreviated, like *New York City, NYC* and states are often specified by their mailing abbreviation, like *TN* for *Tennessee*.

— **Nicknames**

- The cars or motorcycles of the BMW corporation are sometimes nicknamed a *Beamer, Bimmer, Beemer*.
- If you have a facial tissue product, you may need to consider that some people call *tissues* by the de facto brand name, *Kleenex*.
- *Lip balm* is sometimes referred to as *Chapstick* or *lip gloss*.
- If you are looking for mentions of a person's name, don't forget all the variations of common names like *William*, which could be *Will, Willy, Bill, Billy, even Liam*.
- A *beer* could be called a *brew, draft, cold one, brewski/brewskie, ale, lager, suds*, and even *liquid courage!*

---

Brainstorm on all the ways you can express what you want to monitor.

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### — Multiple spellings

- Some brand names can be expressed different ways and still adequately reflect their brand. *Hewlett-Packard Corporation* could be mentioned as *Hewlett-Packard*, *Hewlett Packard*, *H-P*, *HP*, or even by its stock symbol, *HPQ*.
- Some words are commonly spelled as one word or two, or misspelled as one word or two. For example, someone may spell the brand name *JetBlue* as two words, *Jet Blue*.
- The term *trademark* is sometimes spelled as two words, *trade mark*.
- The brand name of *Red Bull* is spelled as two words, but if you don't also search for *redbull*, you'll miss mentions of *redbull.com* or the hashtag *#redbull* on Twitter, any profiles where the username *redbull* is used because the site doesn't support spaces in profile names, or any time someone incorrectly spells it as one word.

### — Misspellings

- If you're a caterer, and include appetizers on your menu, when monitoring for what *appetizers* are most popular at weddings you'd have to deal with variations of the commonly misspelled word, *hors d'oeuvres*.
- Sometimes words are abbreviated by purposely misspelling them, especially in tweets to meet the character limit of Twitter. If they're important to your search, you should include likely abbreviations, such as the word *problem* being shortened to *prblm*, *prblms* or *prblmz*, or the word *services* being shortened to *svc*, *svcs*, etc...

### — Common grammatical errors

- Often these errors in a brand name have to do with apostrophes. A company name that includes the words *Actors' Studio* could be erroneously expressed as *Actors Studio*, or *Actor's Studio*.
- Other common grammatical misspellings are with the words *there*, *their*, *they're* as well as *you're* and *yours*, which is also abbreviated as *ur* in texting and tweeting.

## Filters

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Some tools have additional steps called **filters** which take the results from a query and limit the results to meet certain criteria (such as the type of site, the geographic location, or the date range). However, the filter is usually in addition to or a step after the query itself.

## Basic Boolean Search Operators

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Searching for a keyword or group of keywords is too general for most searches. Just imagine if you wanted to find social mentions of a business name like *Coach House Apartments*. A simple query that looks for any of the keywords *coach*, *house*, or *apartments* would open a fire hose of mentions. We need to be able to specify which words we should have, which we must have and which we don't want at all.

A Boolean search is a type of search that lets you combine keywords with operators like **AND**, **OR** and **NOT** to limit, widen or further define your search for more relevant results.

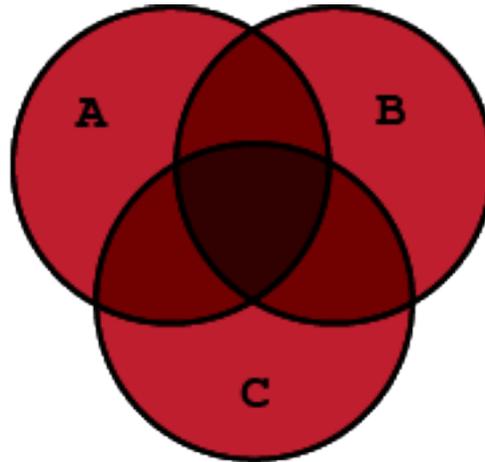
- **OR**- Use of the **OR** operator looks for mentions of any of the keywords in a list.
- **AND**- the **AND** operator specifies which words in a list must be included in the search results.
- **NOT**- Any words specified by the **NOT** operator would exclude results if they appear.

A Venn diagram shows the possible relations between sets. So if the set of all mentions of term A are in the first circle, all mentions of term B are in the second circle, and all mentions of term C are in the bottom circle, we can study the result sets of combining or excluding mentions.

# OR

---

If we are looking for any mentions of keywords *A*, *B* or *C*, we would get a result that includes all the mentions for all three keywords – every result colored in red (everything).



**A OR B OR C**

Let's use sets of numbers to also illustrate this. If  $A=\{1,2,3,4,5\}$  and  $B=\{1,3,5,7\}$  and  $C=\{4,5,6,7\}$ , then  $A \text{ OR } B \text{ OR } C$  would be all of these numbers  $\{1,2,3,4,5,6,7\}$ .

For our *Coach House Apartments* example, if we did a Boolean search of `coach OR house OR apartments`, we would get every mention that included the word *coach* or the word *house* or the word *apartments*. That would be a huge amount of mentions! Every recent mention of a sports team that used the word *coach* could show up in the results, along with every real estate mention for any *house* for sale or the TV show *House*, as well as anyone talking on twitter about how small the *apartments* are in their building. Clearly this is not the way to find mentions of *Coach House Apartments*.

---

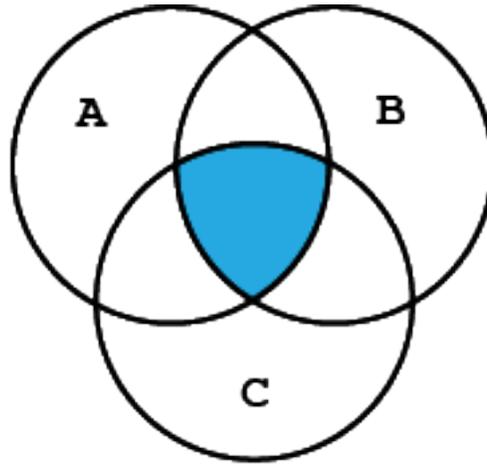
OR includes,  
AND connects,  
NOT excludes.

---

# AND

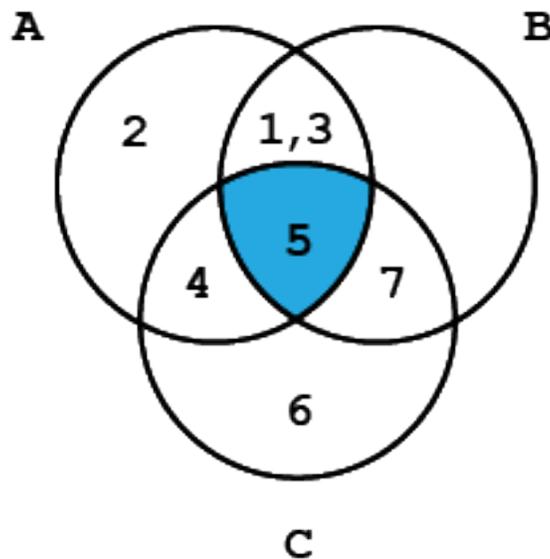
---

If we are looking only for mentions that include all three keywords, *A*, *B*, and *C*, we would get a set of results that includes only any mentions that are found in all 3 circles – colored in blue.



**A AND B AND C**

Using our sets of numbers to illustrate this again, if  $A=\{1,2,3,4,5\}$  and  $B=\{1,3,5,7\}$  and  $C=\{4,5,6,7\}$ , then **A AND B AND C** would only be the numbers appearing in all three sets, which would only be  $\{5\}$ .



$$A = \{1, 2, 3, 4, 5\}$$

$$B = \{1, 3, 5, 7\}$$

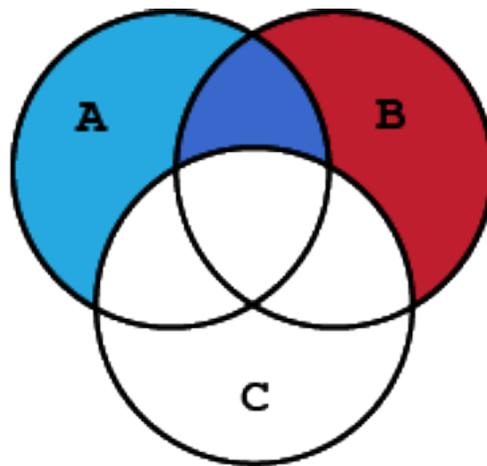
$$C = \{4, 5, 6, 7\}$$

So for our *Coach House Apartments* example, we must have the words *coach* and *house* and *apartments*. But we would want to exclude words like *condos*, and *condominiums*. However, we still would get a fire hose of mentions because *coach*, *house* and *apartments* are commonly used words, and may still miss variations in spelling. Theoretically is not unreasonable that somewhere there could be a blog post or a social mention where someone left the *house* to attend a baseball game, thought the *coach* misjudged their opponents and the pitcher allowed a home run that went out of the ball field to the nearby *apartments*.

## NOT

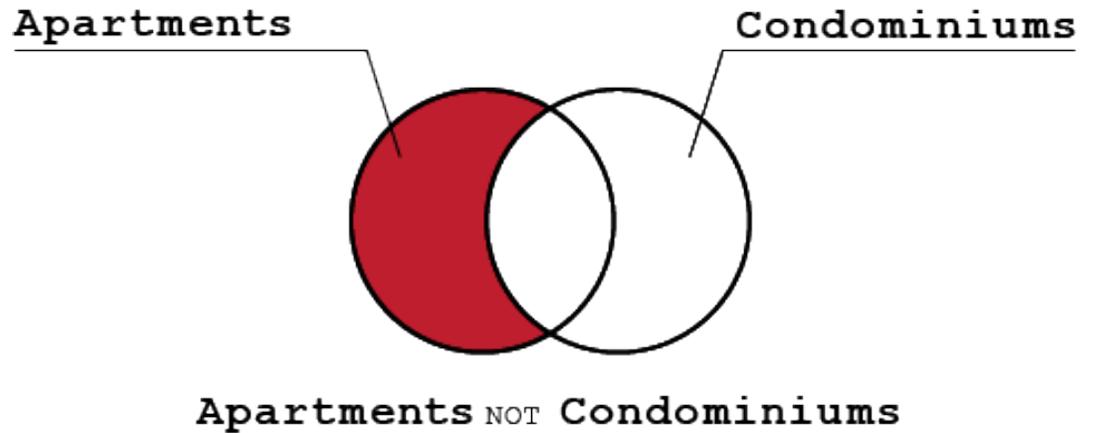
---

One way to try to narrow the search and eliminate unwanted mentions in the results is to use the Boolean operator, NOT. The NOT operator excludes any results with the specified term. Using a Venn diagram to demonstrate this, if we wanted all the results that are in sets *A* and *B*, but not those in *C*, the results would include everything that includes both *A* and *B* but excludes any of those which have *C*, as pictured in the following diagram.



**A OR B NOT C**

If we are looking for mentions of *apartments*, but don't want any mentions that include *condominiums*, the Boolean search string would look like:



We would only want the mentions that have the word *apartments* but not any that also have *condominiums*.

## Advanced Boolean Search Operators

---

While experimenting with some of the available social media monitoring tools, it is clear that many of them were woefully inadequate to be an effective monitoring tool because of the inflexibility of the query functionality. In all but the most basic of keyword searches, the tools could not accommodate any keyword variations or misspellings.

There are additional Boolean search operators that are often used and associated with any kind of search query in software, but are not always implemented in social media monitoring tools. These additional operators help refine your search to make it more accurate and powerful.

## Quotes - “”

---

Quotes specify a string of characters that should be searched for exactly as specified. That allows related words to be kept together so you can search for an exact phrase, instead of separate words. Therefore we could search on

---

```
"coach house apartments"
```

---

(with quotes) and only results with those 3 words in that exact order will show up. Whether or not each of the three words is capitalized or not usually doesn't matter, it's not case sensitive. However if some place the apartments were referred to as *coach house apts*, *coach house apartment*, *coach house luxury apartments* or *coach house rental apartments*, we would miss that mention. So it's not the best solution if there is ever any variation in your brand name or keywords.

Combining quotes with our basic Boolean search operators could be used to keep the *coach house* brand name words together since the name of the apartments will always be those two words in that exact order. Then we can add our *apartments* word as an additional term to search for, which will take care of the case of mentions such as *coach house rental apartments*.

---

```
"coach house" AND apartments
```

---

## Grouping with Parentheses - ()

---

One important and often overlooked operator in search expressions is the humble but powerful parentheses. The way in which you group search terms together and the order that they are performed can make the difference between good results and junk.

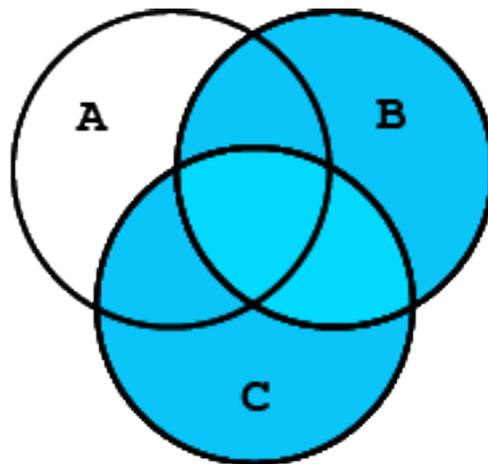
Here is an example of the difference parentheses can make. In the first diagram, we first perform the OR operation to select any mentions that are both in circle B or circle C (shown in light blue). Then from that set, we want only the intersection of that set that is included within circle A (shown in purple). We can express that with:

---

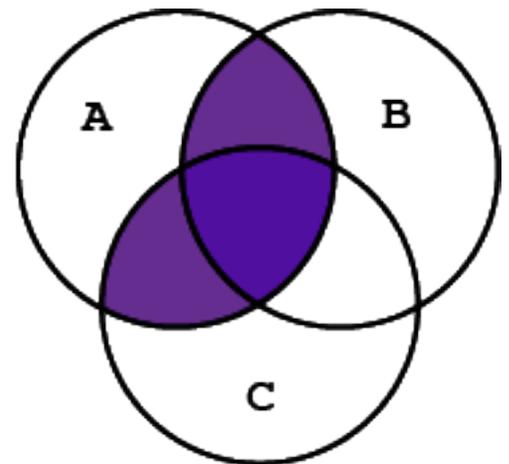
$A \text{ AND } (B \text{ OR } C)$

---

Using the parentheses to perform the  $(B \text{ OR } C)$  function first followed by selecting only those results that also include A, our final result is fairly small.

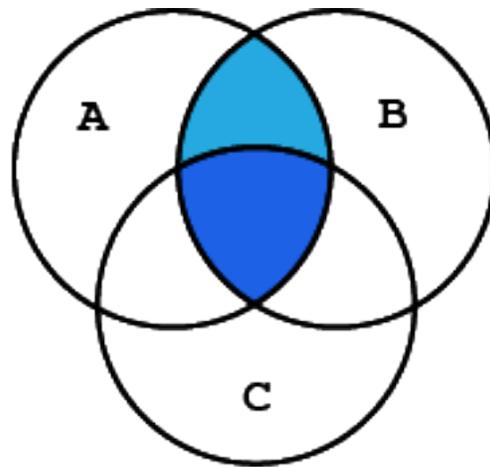


$B \text{ OR } C$

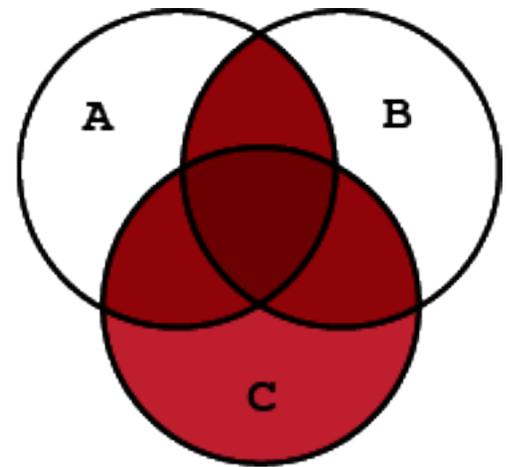


$A \text{ AND } (B \text{ OR } C)$

But if we moved the parentheses to perform the AND operation first (shown below in light blue), and then add anything in the C circle, you combine both and it's a much larger set of mentions.



**A AND B**



**(A AND B) OR C**

This is a common problem with social media monitoring tools which do not allow the use of parentheses to specify the order of the Boolean operations. If the order is only from left to right, the *A AND B* functionality will go first, which we cannot assume is what we need.

---

The way you group and the order you perform Boolean search strings can make the difference between good results and junk.

---

Let's say some people spell the apartment brand name as two words, and some combine them. We would want to search for *Coach House* or *Coachhouse*. Also, people often abbreviate *apartments*, and may use the singular instead of the plural. The parentheses lets us choose between any variations of these words and then lets us combine them with the rest of the string.

---

```
("coach house" OR coachhouse) AND (apartments OR apartment OR apt OR apts OR rental OR rentals)
```

---

This query may return *coach house apartments*, *coachhouse apartment*, *coach house apt*, *coach house rentals*, etc., but not necessarily next to each other, they could be scattered about the web page or social mention.

## How Parentheses Change Search Results

---

To help better illustrate the value of parenthesis, let's create a celebrity persona we want to track named Melissa White, who changed her name to Melissa Jackson after marrying. In this example, we would look for mentions of either the last names *White* or *Jackson*:

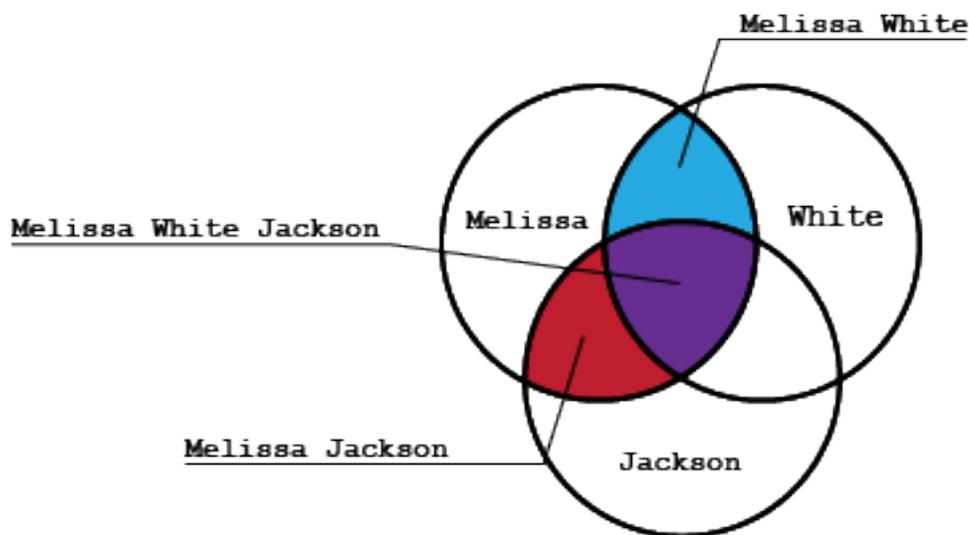
---

white OR jackson

---

There would be a huge amount of mentions, including anything mentioning the color white, or any references to Michael Jackson.

Then from those results, we'd only include mentions that also included the name *Melissa*, which can be done with the AND operator.



### **Melissa AND (White OR Jackson)**

This basic example would give us results (anything in color) that includes mentions of *Melissa* and *White* (in blue) or *Melissa* and *Jackson* (in red) or both (in purple), a much narrower set.

---

If this were a real Boolean search in a social monitoring tool, we would have to use a proximity operator (described later) to make sure Melissa is next to one of the two choices for last name.

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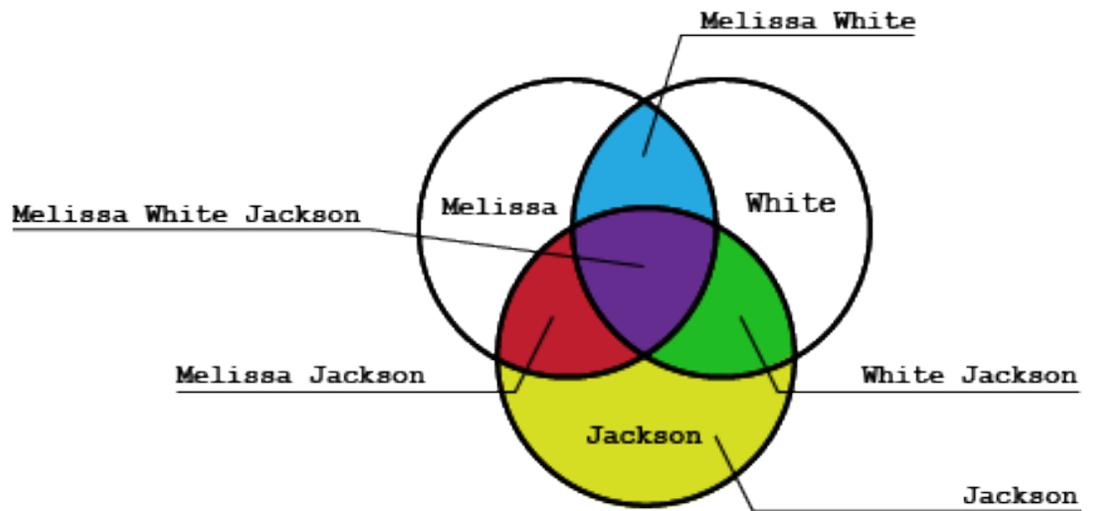
Now let's use our example to demonstrate what happens when the parentheses are moved around (or if there are no parentheses allowed so the query is performed by default from left to right). The first operation performed would be to select mentions that included *Melissa* and *White*.

---

melissa AND white

---

Then we would add to the set any mentions of the name *Jackson*. This would give us a much bigger set of results with many useless mentions of the name *Jackson* without any reference to *Melissa White* (the yellow area). This is represented in the diagram below by ANY colored areas.



**(Melissa AND White) OR Jackson**

Clearly the use of the parentheses is imperative to ensure the Boolean operator functions are performed in the correct order.

## Using Parenthesis to Combine Tasks

---

Parentheses are also useful for combining a bunch of search tasks together and specifying the order. For example, what if you were monitoring people discussing apple pies and peach pies (plural or singular) on social networks, but you don't want to capture any results that mention frozen pies. You can combine a Boolean query to find the two types of fruit combined with plural or singular forms of *pie*, and then remove any *frozen* mentions.

---

If this were a real Boolean search in a social media monitoring tool, a proximity operator (described later) should be used to specify that the type of fruit and the word pie or pies should be very close to each other.

---

---

```
((apple OR peach) AND (pie OR pies)) NOT frozen
```

---

Set 1: (apple OR peach) = results containing the words *apple* or *peach*

Set 2: (pie OR pies) = results containing the words *pie* or *pies*

Set 3: ((apple OR peach) AND (pie OR pies)) = results with both sets of words in them (e.g., *apple pie*, *apple pies*, *apple cobbler pie*, *peach pie*, *peach pies*, *peach homemade pie*, *frozen apple pies*)

Final set: NOT frozen = results in set 3 and any page that has the word *frozen* in it is removed.

## Wildcards and Truncation - \*, ?

---

Wildcards provide the ability to specify that some characters can be substituted for anything in your search query. There are usually two types of wildcards – a single character wildcard, or a truncation wildcard.

### Truncation Wildcard - \*

---

Sometimes there are variations with the word tense that you want to account for in your search. Most tools which support wildcard functionality will use the "\*" symbol to indicate truncation. Truncation expands the search to include any words that begin with same characters, but could end in anything of any size. So searching for *house\** would include *house*, *houses*, *housed*, *household*... but not *housing* because all 5 characters of *house* is required to start the word. In some platforms, the "\*" symbol represents a multiple character wildcard which can be used in the middle of a word, which allows for zero or more characters to be represented by the "\*".

## Single Character Wildcard - ?

---

The “?” symbol usually acts as a single character wildcard, replacing only 1 character in the word. So `apartment?` would include *apartments*, but not *apartmentalize*. Note that it requires a character to exist where the “?” symbol is. So `Jet?Blue` will find *Jet-Blue* and *JetsBlue*, but not *JetBlue*.

In this case, the “\*” symbol would work better, because zero or more characters could be represented by the “\*”, so `Jet*Blue` would include mentions of *JetBlue*. Just be careful that it doesn’t include too many irrelevant variations. A search on `toys*us` would find *Toys”R”Us*, *toysrus*, *toys-r-us* and *ToysRUs*, but will also find *Toysaurus* (which includes a World of WarCraft character, a gun store and a Japanese dinosaur sculpture), or mentions with other random words like *Toys4Us*, *toysareus*, *toysrlikeus*.

Here is an example of the variations of words that could be represented by using wildcards:

<code>journalis*</code>	<code>journalis?</code>
<code>journalism</code>	<code>journalism</code>
<code>journalist</code>	<code>journalist</code>
<code>journalish</code>	<code>journalish</code>
<code>journalists</code>	
<code>journaliser</code>	
<code>journalistic</code>	
<code>journalistically</code>	

Let’s go back to our *Coach House Apartments* example to see how we can use wildcards to expand our search or condense the length of our Boolean search strings.

Will `coach*house` find results with mentions of *coach house* and *coachhouse*? In most cases, only *coachhouse* because the use of the “\*” wildcard will find zero or any number of non-space characters between *coach* and *house*. So it won’t find *coach house* because the wildcard cannot represent a space. So `coach*house` will not find results with a space between the words, i.e., *coach house*, but could find *coacheshouse*, *coach2house*, *coachinthehouse.com*, etc. Just imagine if it did, then any number of words between *coach* and *house* in an entire social mention or web page could be found.

---

Wildcards are great for including slight variations of words and condensing the length of our queries.

---

So instead of explicitly including each variation of the word *apartment* or *rental* with and without plurals as in:

```
("coach house" OR coachhouse) AND (apartments OR  
apartment OR apt OR aptS OR rental OR rentals)
```

We can shorten the second part of query string using wildcards to pull in singular or plural terms.

```
("coach house" OR coachhouse) AND (apartment* OR apt*  
OR rental*)
```

Shortening it even further, it is possible (but not recommended in this example) to combine *apartment(s)* and *apt(s)* together could be done, as in:

```
("coach house" OR coachhouse) AND (ap*t* OR rental*)
```

but that will include many other mentions that are likely unwanted, expanding *ap\*t\** to include words such as *application*, *appointment*, *apparently* and *Aphrodite*.

## Proximity with ~ or NEAR

---

Just finding *coach* and *house* existing on the same page will likely bring us results that we do not want. Often two or more words are associated with each other and will be in close proximity with each other, however, in some cases may not always be exactly next to each other.

In our example, we would like the 3 words which make up the name of our apartments to be close to each other. A proximity operator can solve this problem. Some tools use the tilde (~) character to represent proximity. It will find mentions of the words within the quotes within the specified number of words from each other in any order. For example,

---

```
"coach house apartments"~7
```

---

Will find mentions of the exact phrase *coach house apartments*, as well as any time those 3 words are within 7 words of each other. So mentions like *coach house luxury apartments* or *John House is a life coach at the apartments* will be included in the results.

However, what's in the quotes is taken literally, so we can't include other Boolean operators within the quotes or specify wildcards, such as `apartment?` to indicate we'll take any mention that starts with *apartment* and an additional character (so we could include the plural, *apartments*).

If the words you are searching for have multiple variations, some monitoring tools offer a `NEAR` style operator that can be used in combination with Boolean expressions instead of limiting it to the words within the quotes as with the `"~"` operator. `NEAR` is like `AND` in that both words must appear. However, `NEAR` says the two words must be within a certain number of words near each other. So we could change that part of our search query to be

---

```
("coach house" OR coachhouse) NEAR/2 apartments
```

---

In this example, every mention will have to have the phrase *coach house* at most two words apart from the word *apartments*. We use parenthesis because we want to find mentions of *coach house* or *coachhouse* first, and then see that the phrase is near to *apartments*. However, since it works with Boolean expressions, we can use it for when people abbreviate apartments or change from plural to singular:

---

```
("coach house" OR coachhouse) NEAR/2 (apartment* OR apt*  
OR rental*)
```

---

With this granularity, we could find even more mentions such as *coachhouse apartment*, *coach house luxury apts*, *coach house has apartments*, *coach house rentals*. So having proximity operators helps us fine tune our query by specifying that the words only have meaning when they are next to each other, yet also find more relevant mentions when we can account for variations within our proximity requirements.

To fine tune it even further, some social media monitoring tools may expand the `NEAR` operator to specify if one word should always follow the other, not just be in close proximity before or after. So `(coachhouse NEAR/1 apartments)` may find *coachhouse apartments* or *apartments at coachhouse*, but including the `f` character with the `NEAR` operator requires the second word to follow the first. Therefore, `(coachhouse NEAR/1f apartments)` will only find *coachhouse apartments*, but not *apartments coachhouse*.

# Why Many Social Media Monitoring Tools Are Inadequate

---

The user interface provided by the tool often dictates how complex a query it can support.

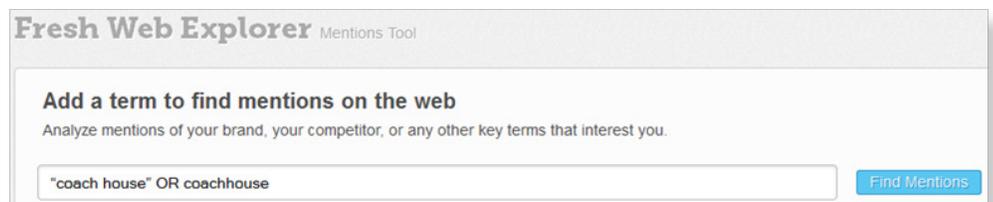
We surveyed a handful of social media monitoring tools and found a wide array of interfaces for creating queries. For the most part, many of them were severely limited, but it may not be apparent until you've already laid out the money for the tool and then find out how difficult it is to limit the results to what is relevant because query generation is inadequate.

## Boolean Search Query User Interface

---

Some tools will just let you directly type in a string of keywords and Boolean operators, as in Fresh Web Explorer:

Fresh Web Explorer is a paid research tool provided by moz.com.

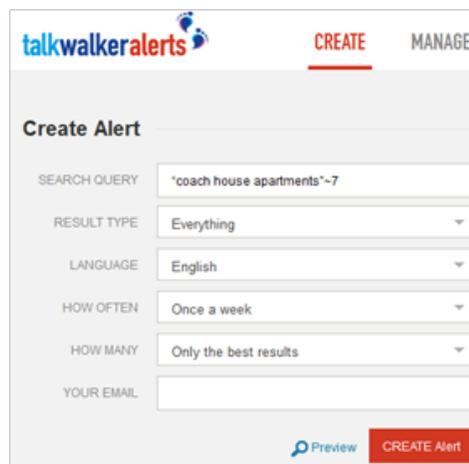


The screenshot shows the 'Fresh Web Explorer Mentions Tool' interface. It features a text input field containing the search query '"coach house" OR coachhouse'. To the right of the input field is a blue button labeled 'Find Mentions'. Above the input field, there is a heading 'Add a term to find mentions on the web' and a sub-heading 'Analyze mentions of your brand, your competitor, or any other key terms that interest you.'

However, even if they say they will accept a Boolean search expression, it is still important to see which Boolean search operators are available. In this example of Fresh Web Explorer, they do not accept parenthesis in their Boolean search expressions. Without the use of parenthesis, you can't specify the order of how you want to search or parse groups of keywords that are variations of each other and the search falls apart.

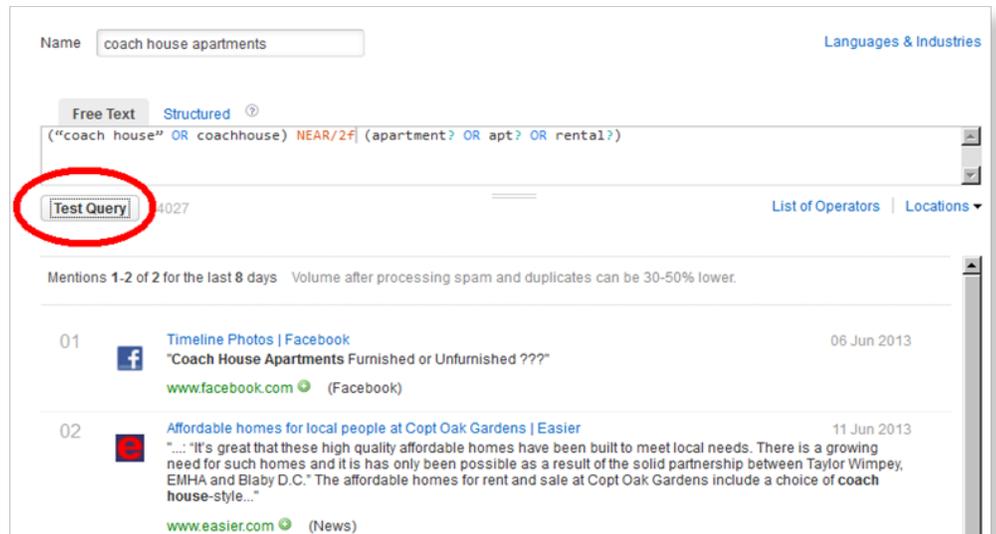
Some tools will provide boxes or fields for you to add a Boolean search query with additional filters available at the time of the query, as in this example from the tool, [Talkwalker](#).

This screen shot is from the free alerts feature of Talkwalker, not the paid social media monitoring tool.



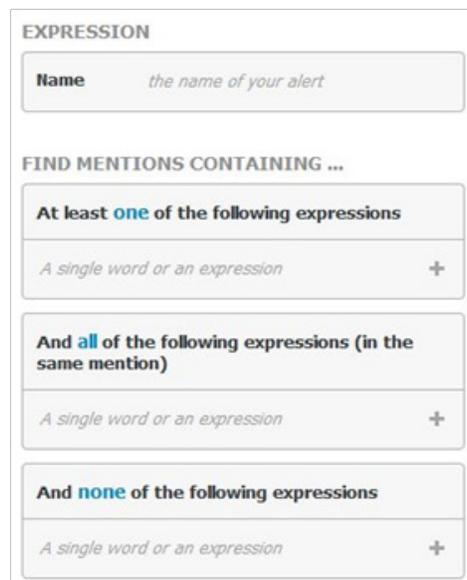
The screenshot shows the 'talkwalkeralerts' interface with a 'CREATE' button highlighted. Below the navigation is a 'Create Alert' form. The form includes the following fields: 'SEARCH QUERY' with the value '"coach house apartments"-7', 'RESULT TYPE' set to 'Everything', 'LANGUAGE' set to 'English', 'HOW OFTEN' set to 'Once a week', and 'HOW MANY' set to 'Only the best results'. There is also a 'YOUR EMAIL' input field. At the bottom right of the form are two buttons: 'Preview' and 'CREATE Alert'.

Other tools will provide a field for you to add a Boolean search query and let you do a test of the query so you can see if it is returning the kinds of results that you want, as in this example from the tool, Brandwatch.



Some tools have an interface with separate fields where you can list keywords that must be included in the search and keywords you want to exclude from the search. But unless they allow you to tweak the Boolean search string that was just built by the tool, there may be no way to specify order/proximity, variations within those sets of keywords, wildcards or other factors.

The following screenshot from the tool, Mention, looks easy enough, but you cannot specify order or group search strings together with parenthesis.



## Reducing Irrelevant Results

---

Some social media monitoring tools have licenses based on a per-month limit to the number of mentions that are returned. If a large percentage of your results are irrelevant, then you're not only wasting time, but you're wasting money!

---

Irrelevant results wastes time and money!

---

Even if a tool has advanced query functionality to fine tune what to search for, we all know the internet is full of bogus web sites that are full of spam links and scraped content. Having a tool which can filter those out of the search queries will be very useful if you need to focus only on credible mentions of your brand name. Having to wade through your result data and delete all of the spammy, bogus, or irrelevant mentions is very time consuming. See if the social media monitoring tool you are considering has built-in spam detection or anti-noise technology.

## Additional Search Operators You May Need

---

All social monitoring tools handle the basic Boolean operators AND, OR and NOT. Most should support additional Boolean functionality like quotes, parentheses, wildcards and proximity. Here is a summary of some additional search criteria that should be supported by the social monitoring tool you are considering in order to build an effective query:

1. **Special characters** – You may need to handle characters such as hyphens, apostrophes and ampersands in queries. For example, can the query include the special characters in brand names such as *Hewlett-Packard*, *AT&T*, and *Macy's* without returning an error? Some tools provide a raw data operator that defines a search keyword that consists of a string of characters that includes special characters. Without such an operator, the query could return a syntax error, or the special character may be ignored.

For example, a search on *Google+* may ignore the plus sign. In the social media monitoring tool Brandwatch, searching with `raw:Google+` will include the plus sign. In the Talkwalker tool, it uses a plus sign to indicate raw data. So `+“M&M”` would include the ampersand (&) character in the search.

2. **Case** – If upper or lower case matters in the types of things you are searching, see if the tool can support searches where letter case is respected. In Talkwalker, two plus signs will respect case, as in `++“eBay”`, where the *B* must be capitalized in the mentions retrieved.

3. **Boolean Operator Words** - Can the query differentiate between words that are part of the keywords you are monitoring and the Boolean search operators, such as AND, OR, and NOT? When evaluating the social monitoring tool, [Brandwatch](#), we discovered it could not tell the difference, however, it had enough other powerful search operators that we could easily work around this limitation. Other tools only treat such words as Boolean operators when they are in all capital letters. In Talkwalker, a query of `free and easy` will return mentions of the phrase *free and easy*. However a query of `free AND easy` will return mentions where the word *free* and the word *easy* appear anywhere.

4. **URL or domain** – Sometimes we want to limit our results to be only from a specific domain name or specific URL, or alternatively we want to exclude a specific domain or URL from our results. Perhaps we have a restaurant chain in many locations and we only want to look for our company name on a specific review site. This may be expressed in a format like `site:www.yelp.com` for an entire domain or perhaps a specific URL or subdirectory, for example if we only wanted to see reviews for our restaurants in New York City, `url:www.yelp.com/nyc`. Alternatively, we may want to exclude mentions coming from our own brand's site, for example, `NOT site:www.my-restaurant.com`.

---

Brandwatch does not consider tweets from an author as mentions, only when mentioned by someone else. To include tweets sent, use the `author: operator`. So if I am monitoring *brandname*, tweets from `@brandname` would not be included, but twitter mentions of `@brandname` would. To include both, the query should be `brandname OR author:brandname`.

---

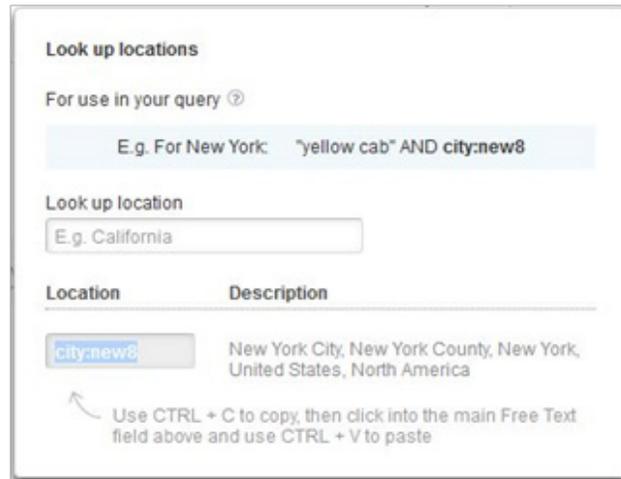
5. **Author** – If you expect to be looking for mentions related to a person, then you may need a tool which supports an `author: operator`. When detectable, it would retrieve mentions from specific authors. For example, you don't want every mention of author Stephen King, but you want to find articles where he was the author. You would add `author:"Stephen King"` to the query.

6. **Title** – Depending on the tool, doing a search with the `Title:` tag may look for mentions of your query in the titles of an article, or it may look for mentions in the title of the web page, as specified in the `<title>` tag.

7. **Geographic location** – If our business is local or we are targeting a specific geographical area, we would want to limit mentions to sites from those areas or sites talking about those areas. Some tools have query operators just for location or country, some provide a way to automatically include variations of a location's name (e.g., *New York City, NYC*) as part of the query, and others allow post-search filtering of the mentions.

### Specifying Location in the Query

In the social media monitoring tool Brandwatch, specifying `country:uk` in a query would only find mentions that have been identified as from the UK. Brandwatch also has a pop-up that constructs location operators for specific areas, so entering *New York City* would create the location operator of `city:new8`.

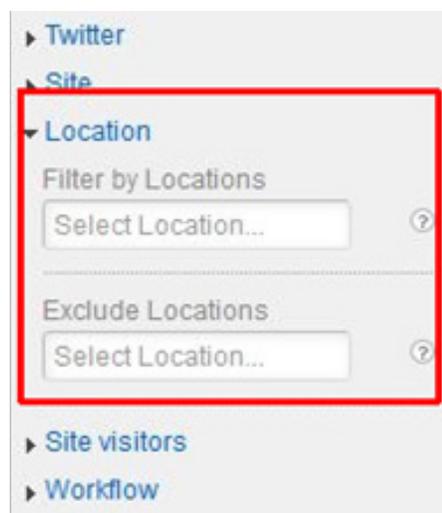


### Distinguishing Location Mentions from Origin Location

Other tools allow separate distinctions of finding the location name in the source, versus finding the country of origin of the source. For example, with the tool Talkwalker, a filter of `articlecountry:de` would include all articles that contain the word *Germany*, while a filter of `sourcecountry:de` would include articles from German sources or articles published in Germany.

### Filter by Location After Query

The following screenshot shows how the social media monitoring tool, Brandwatch, allows you to filter by location after you have your query results – either by including locations or excluding them.

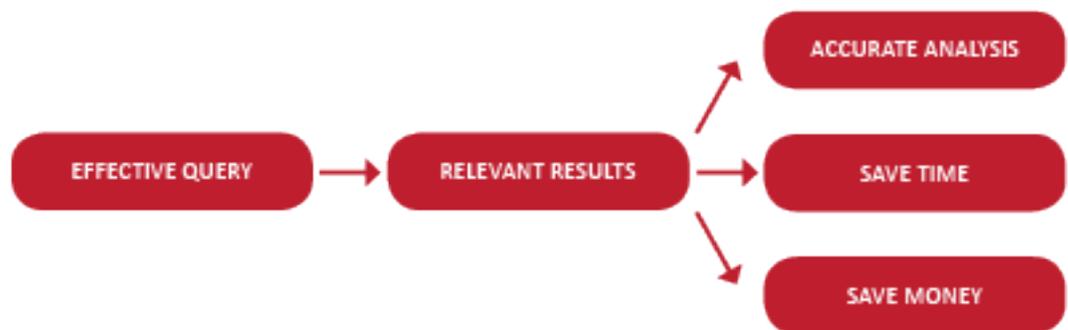


8. **Ability to save your queries** – After building a complex query, you don't want to go through the trouble of remembering what you've searched on every time. The tool must be able to save your queries so you can rerun them again and again, as well as edit and fine tune them. Some tools may limit the number of queries you can save, based on the licensing version you have purchased. If you've put in a lot of work to construct a complex query, it is probably a good idea to save those query strings somewhere locally in a document just in case you need them again, for example, if you accidentally delete them or would like to reuse them for another client in the future.

## The Key to Success

---

Even if a social media monitoring tool has great bells and whistles for analysis and reporting, if the initial set of data from the query is full of garbage you don't care about, then you're wasting your time and skewing your analysis because you're basing it on data that includes irrelevant results.



---

The key to the successful analysis of your mentions depends on the quality of the data the query retrieves.

---

Therefore the key to the successful analysis of your data is the query. The key to an effective query is the ability to include and exclude keywords and variations of keywords, specify proximity, and parse it all into a logical hierarchy so related parts of the query can be grouped together and operated on in the appropriate order. When you can narrow down the scope of your results to be focused on only relevant results, you save time. Also any analysis performed on the data will be more accurate.

# Social Media Monitoring Tools Comparison Case Study

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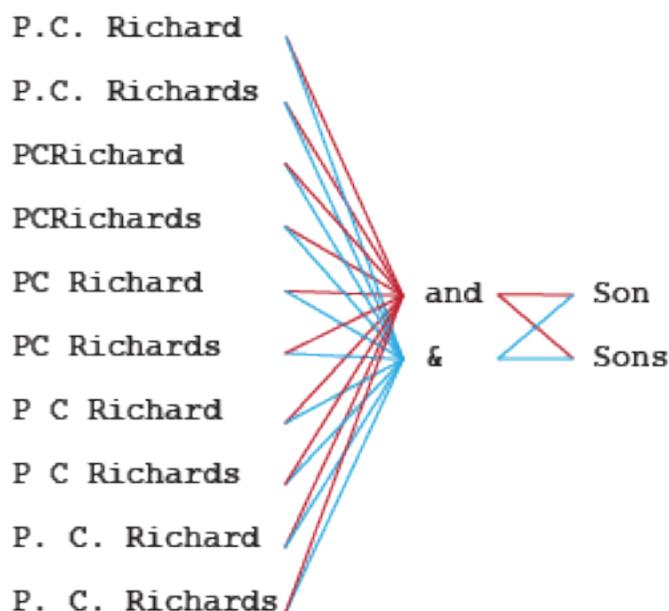
To help illustrate the difference a powerful Boolean search query can make when it comes to social monitoring, let's take a look at the brand name *P.C. Richard & Son*, a chain of appliance and electronics retail stores. We will see how we can monitor this brand name in three different types of tools. The tools were chosen based on the style of interfaces they provide for search queries.

1. [Brandwatch](#): An enterprise level browser-based social media monitoring tool with a paid-subscription pricing model based on how many mentions are found per month. It features unlimited user logins, customizable dashboards, filters, alerts, location data, sentiment analysis, charting and reporting. Their queries allow for complex Boolean search criteria with many powerful operators to help limit results to specifically what is wanted.
2. [Fresh Web Explorer](#): A simple, browser based social media monitoring tool that accepts rudimentary Boolean search criteria. It is part of the [moz.com set of tools](#).
3. [Mention](#): A social monitoring tool meant for professional or individual use that has a user interface to enter keywords for queries. It also creates alerts for real-time mentions and includes reporting functionality and other features. We used the free trial version for these examples. More expensive plans include unlimited alerts, more mentions allowed per month, unlimited history, access to statistics and data export and support for multiple users. Mention can be used as a browser-based tool, running native on the desktop, or as a mobile application.

## Variations And Permutations Of The Brand Name

---

The first step to consider when doing brand name monitoring is to evaluate the variations in the brand name that can be found on the internet. Some people may be confused at times whether or not the *Richard* or *Son* parts of the brand name are plural. There's also variation in how the *P.C.* part is abbreviated, and if the word *and* is spelled out or if an ampersand symbol (&) is used.



All of these permutations result in 40 different ways to express the brand name!

- |                            |                             |                          |
|----------------------------|-----------------------------|--------------------------|
| 1. P C Richard & Son       | 15. P. C. Richards and Son  | 28. PC Richard and Sons  |
| 2. P C Richard & Sons      | 16. P. C. Richards and Sons | 29. PC Richards & Son    |
| 3. P C Richard and Son     | 17. P.C. Richard & Son      | 30. PC Richards & Sons   |
| 4. P C Richard and Sons    | 18. P.C. Richard & Sons     | 31. PC Richards and Son  |
| 5. P C Richards & Son      | 19. P.C. Richard and Son    | 32. PC Richards and Sons |
| 6. P C Richards & Sons     | 20. P.C. Richard and Sons   | 33. PCRichard & Son      |
| 7. P C Richards and Son    | 21. P.C. Richards & Son     | 34. PCRichard & Sons     |
| 8. P C Richards and Sons   | 22. P.C. Richards & Sons    | 35. PCRichard and Son    |
| 9. P. C. Richard & Son     | 23. P.C. Richards and Son   | 36. PCRichard and Sons   |
| 10. P. C. Richard & Sons   | 24. P.C. Richards and Son   | 37. PCRichards & Son     |
| 11. P. C. Richard and Son  | 25. PC Richard & Son        | 38. PCRichards & Sons    |
| 12. P. C. Richard and Sons | 26. PC Richard & Sons       | 39. CRichards and Son    |
| 13. P. C. Richards & Son   | 27. PC Richard and Son      | 40. PCRichards and Sons  |
| 14. P. C. Richards & Sons  |                             |                          |

---

Consider what variations in the spelling of your brand name may be used on the internet (not taking upper or lower case into account).

---

## Method 1: Massive Query Using the OR Operator

---

One way to approach this is to create a massive OR query. If the tool provides a field to type the query, it would look something like this:

```
"P C Richard & Son" OR "P C Richard & Sons" OR "P C  
Richard and Son" OR "P C Richard and Sons" OR "P C  
Richards & Son" OR "P C Richards & Sons" OR "P C Rich-  
ards and Son" OR "P C Richards and Sons" OR "P. C.  
Richard & Son" OR "P. C. Richard & Sons" OR "P. C.  
Richard and Son" OR "P. C. Richard and Sons" OR "P.  
C. Richards & Son" OR "P. C. Richards & Sons" OR "P.  
C. Richards and Son" OR "P. C. Richards and Sons" OR  
"P.C. Richard & Son" OR "P.C. Richard & Sons" OR "P.C.  
Richard and Son" OR "P.C. Richard and Sons" OR "P.C.  
Richards & Son" OR "P.C. Richards & Sons" OR "P.C.  
Richards and Son" OR "P.C. Richards and Sons" OR "PC  
Richard & Son" OR "PC Richard & Sons" OR "PC Rich-  
ard and Son" OR "PC Richard and Sons" OR "PC Richards  
& Son" OR "PC Richards & Sons" OR "PC Richards and  
Son" OR "PC Richards and Sons" OR "PCRichard & Son" OR  
"PCRichard & Sons" OR "PCRichard and Son" OR "PCRich-  
ard and Sons" OR "PCRichards & Son" OR "PCRichards &  
Sons" OR "PCRichards and Son" OR "PCRichards and Sons"
```

## Method 1 Using Brandwatch- 149 Results

This may seem somewhat primitive and error prone, but in tools which accept the query as a text string, like Brandwatch, this works (note: the use of the raw: operator in Brandwatch assures the periods and ampersands are included in the search, however it makes the query case sensitive).

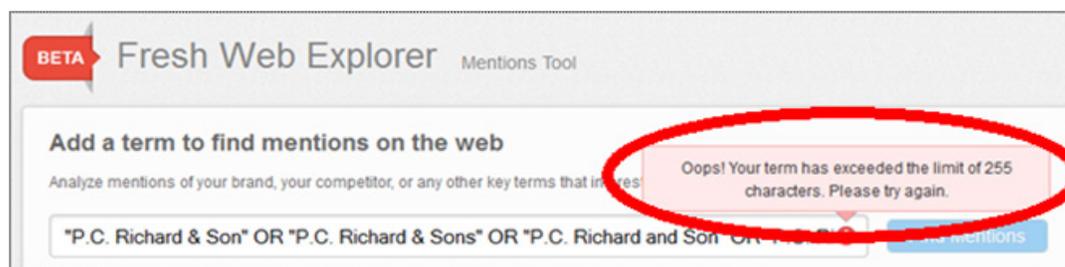
The screenshot shows the Brandwatch interface. At the top, there are tabs for 'Free Text' and 'Structured'. Below them is a search bar containing a long, complex query: `raw:("P C Richard & Son" OR "P C Richard & Sons" OR "P C Richard and Son" OR "P C Richard and Sons" OR "P C Richards & Son" OR "P C Richards & Sons" OR "P C Richards and Son" OR "P C Richards and Sons" OR "P. C. Richard & Son" OR "P. C. Richard & Sons" OR "P. C. Richard and Son" OR "P. C. Richard and Sons" OR "P. C. Richards & Son" OR "P. C. Richards & Sons" OR "P. C. Richards and Son" OR "P. C. Richards and Sons" OR "P.C. Richard & Son" OR "P.C. Richards & Son" OR "P.C. Richards and Son" OR "P.C. Richards and Sons" OR "P.C. Richards & Son" OR "P.C. Richards & Sons" OR "P.C. Richards and Son" OR "P.C. Richards and Sons" OR "PC Richard & Son" OR "PC Richards & Son" OR "PC Richards and Son" OR "PC Richards and Sons" OR "PCRRichard & Son" OR "PCRichards & Son" OR "PCRichards and Son" OR "PCRichards and Sons")`. Below the search bar, it says 'Test Query' and '3094'. To the right, there are links for 'List of Operators' and 'Locations'. Below this, there is a summary: 'Mentions 1-20 of 149 for the last 8 days' and 'Volume after processing spam and duplicates can be 30-50% lower.' The main content area shows two search results:

- Result 16: **Times Square Tomorrow - Goo Goo Dolls Official Blog**, dated 20 Jul 2013. The snippet reads: "...list. iheartradio presents Goo Goo Dolls live at a private P.C. Richard and Son Theater performance in NYC tomorrow, 9/30 at 5:30pm... this show will be broadcast live on the Jumbotron at Times Square, and recorded for later re-broadcast on Clear Channel radio affiliates across the country. iheartradio presents Goo Goo Dolls live at a private P.C...". The source is [www.googoodolls.com](http://www.googoodolls.com) (Blog).
- Result 17: **P C Richard & Son - it has cost us in service calls..they should realize they sold a lemon and rep,ace it**, dated 24 Jul 2013. The snippet reads: "I bought a dishwasher from P C Richard & Son in 2013 and was told it was from the previous year, not long after, the motor went. called fisher paykel and when I gave them serial number, they informed me the washer was 7 years old, they sent factory auth repair to fix the motor. Then few months later the electronic button controls stopped working, agin...". The source is [www.complaintsboard.com](http://www.complaintsboard.com) (News).

If we want to expand the query to work with upper or lower case, the number of combinations goes way up to over 300! Brandwatch has a limitation of 4096 characters for a query and massive OR query for every combination of the name in upper and lower case is over 8000 characters! Surely there has to be a better way to express all combinations without being case sensitive. We'll address this issue in the Method 2 section.

## Method 1 Using Fresh Web Explorer - Character Limits

The free social media monitoring tool Fresh Web Explorer in Beta from Moz gave us this result:



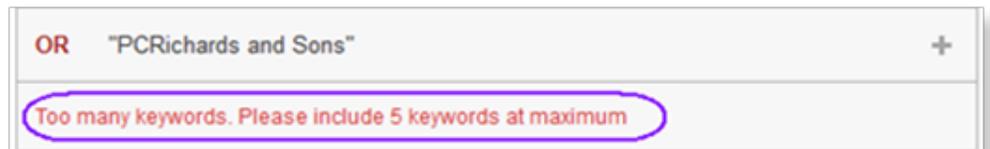
With the limitation of 255 characters, this method will not work for any query which is long and complicated.

## Method 1 Using Mention – Too Many Keywords

On tools which have separate boxes to enter the keywords, it might not even be able to handle all these keywords. Entering all 40 phrases one at a time into the OR fields of Mention can be a tedious process. After entering all of the variations to search on and clicking on the button to create the query, the tool tells us there are limits to the number of keywords you can have in a query.

EXPRESSION	
Name	P.C. Richard & Son Brand Name
FIND MENTIONS CONTAINING ...	
At least <b>one</b> of the following expressions	
	P.C. Richard & Son <span>×</span>
OR	P.C. Richard & Sons <span>×</span>
OR	P.C. Richard and Son <span>×</span>
OR	P.C. Richard and Sons <span>×</span>
OR	P C Richards & Son <span>×</span>

And at the bottom of the list of 40 phrases...



Clearly this approach will not work in Mention!

For this tool to work, you'd have to create multiple queries to do sets of variations. That's a lot to manage, considering each query would require you to set up alerts, analysis, and reports for each one.

Here's one query for variations of the singular *P.C. Richard* plus *& Son*. Because the tool doesn't allow for any further variations within the AND fields or no way to specify the order you want the search criteria to be applied, like (a OR b) AND (c OR d), you would have to do 8 different queries to get all 40 variations in the results. Here's just two of the 8 variations with the *& Son* suffix versus *and Son*.

FIND MENTIONS CONTAINING ...	
At least <b>one</b> of the following expressions	
PC. Richard	×
OR PCRichard	×
OR PC Richard	×
OR P C Richard	×
OR P. C. Richard	×
OR A single word or an expression	+
And <b>all</b> of the following expressions (in the same mention)	
and son	×
AND A single word or an expression	+
And <b>none</b> of the following expressions	
A single word or an expression	+
This finds mentions containing:	
{ PC. Richard OR PCRichard OR PC Richard OR P C Richard OR P. C. Richard } AND and son	

FIND MENTIONS CONTAINING ...	
At least <b>one</b> of the following expressions	
PC. Richard	×
OR PCRichard	×
OR PC Richard	×
OR P C Richard	×
OR P. C. Richard	×
OR A single word or an expression	+
And <b>all</b> of the following expressions (in the same mention)	
& son	×
AND A single word or an expression	+
And <b>none</b> of the following expressions	
A single word or an expression	+
This finds mentions containing:	
{ PC. Richard OR PCRichard OR PC Richard OR P C Richard OR P. C. Richard } AND & son	

Managing all 8 queries to account for all of the variations takes time to create, and then management and monitoring of those queries will take even longer, having to monitor, analyze and create reports for 8 separate queries instead of one comprehensive query for the brand name.

## Method 2: Complex Boolean Query

---

A more efficient way to construct a query without requiring every permutation would be to use complex Boolean search operators, along with parenthesis parsing, special characters, quotes, etc.

### Method 2 Using Brandwatch – Trial and Error Tweaking

---

Using Brandwatch, this complicated Boolean search query can be constructed of the following parts (note: not case sensitive unless the `raw:` operator is used):

Set A: Variations on the *PC* part:

```
raw:("P.C." OR "P. C." OR PC OR "P C" OR "p.c." OR "p .  
c." OR pc OR "p c" )
```

Because the `raw:` operator is case sensitive, we would have to specify all combinations of *P.C.* in both upper and lower cases, assuming no one is using combinations of case. However, Brandwatch treats spaces and special characters equally, so we can find all cases with spaces or special characters using simply: (`"p c" OR pc`). This will resolve having to specify upper or lower case combinations because keywords without the `raw:` operator are not case sensitive.

Set B: Variations on the *Richard* part: (`Richard OR Richards`)

Set C: Additional variations when the *PC* and *Richard* parts are put together:

```
(PCRichard OR PCRichards)
```

Set D: Variations on the *and* part: (`and OR &`)

Set E: Variations on the *Son* part: (`son OR sons`)

To build our query, we want to put together the following parts, represented by letters to simplify:

---

```
((A AND B) OR C) AND D AND E
```

---

Since all of these components make up one brand name, it makes sense to use a proximity operator instead of the `AND` operator. The Brandwatch tool allows `NEAR/x` operators that specify that two keywords should be in close proximity, based on the number you use for `x`. Also, including the letter `f` after the number, as in `xf`, indicates that the second word must follow the first, in that order.

## WHY WOULD WE WANT TO USE NEAR INSTEAD OF JUST AND?

Well just imagine a blog written by *Richard* Smith talking about the *PC* computer he purchased for his *Son*. All the keywords are on that page, but have nothing to do with our brand name. In this case, proximity counts!

The parentheses specify that we want to figure out the variations of the 1<sup>st</sup> part of the name before we find the variations of the 2<sup>nd</sup> part of the name.

---

We could have been even more inclusive and expanded the query to include only the PC Richards part so we can catch cases when people skip the “& Son” part.

---

When you put it all together, the query should have a format following this structure:

---

```
( ( ( A NEAR/1f B) OR C) NEAR/1f D) NEAR/1f E
```

---

It’s important to keep track of your parenthesis! They are color coded to help match them up (sorry if you printed this on a B&W printer!). The parenthesis specifies the order – we resolve the *PC* part next to the *Richard* part, or accept it when they’re put together into one word. Then we take those results and make sure there’s some sort of *and* or *&* character following it. Finally we take those results and make sure there’s a *son* or *sons* after that. We only want to search for pages which have those 40 variations of the brand name in it.

When we plug in the actual keywords, our Brandwatch Boolean query string looked like this:

---

```
((("p c" OR pc)
NEAR/1f (Richard OR Richards))
OR (PCRichard OR PCRichards))
NEAR/1f (and OR raw:&))
NEAR/1f (Son OR Sons)
```

---

In Brandwatch, the `raw:` operator lets you take symbols literally, so we used it for the ampersand.

We thought everything was just awesome, but tried to create the new query and got this error:



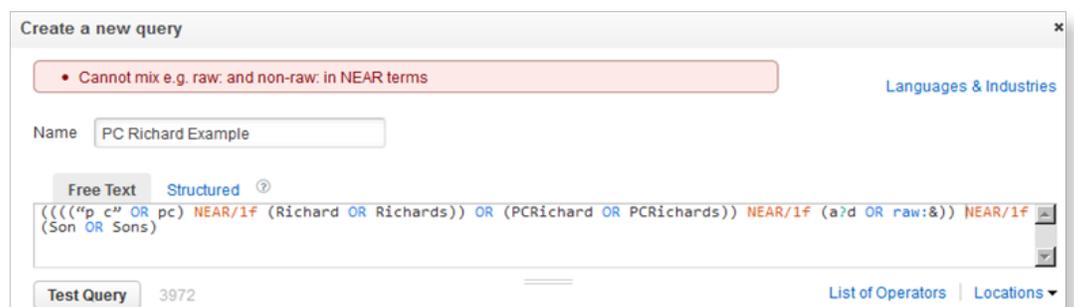
It turns out Brandwatch cannot differentiate between the keyword *and* and the Boolean operator `AND`, despite the difference in case. Even putting `and` in quotes or trying to specify it literally with `raw:and` gave us the same results. Brandwatch support did not have a resolution to this issue at the time of this paper, but they are now aware that it can be a problem.

However, because Brandwatch provides a rich set of operators available for the Boolean search string, the wildcard functionality can be used as a workaround. With the assumption that there wouldn't be any search results for things spelled similarly to the word *and* with a different character than *n*, the search expression `a?d` will match any word that has 3 characters starting with *a* and ending in *d* with anything in between. This is a good example of how a rich set of query operators allows for flexibility to work around any potential issues. So our query now looked like this:

---

```
((("p c" OR pc)
NEAR/1f (Richard OR Richards))
OR (PCRichard OR PCRichards))
NEAR/1f (a?d OR raw:&))
NEAR/1f (Son OR Sons)
```

---



We discovered a syntax restriction where Brandwatch doesn't allow the `raw :` operator to be used alongside the `NEAR` operator. Because it is more important that the variations of `& Son` really need to be immediately after the first part, we will make the assumption that the `Son` or `Sons` will be within 1 word of the first part and just not include the `and` or `&` keyword in the Boolean search criteria. This example demonstrates that the syntax of tools can be picky and it may take longer than expected to formulate the appropriate Boolean search strings.

Finally, our test query works and finds 169 mentions over the last 8 days. In the example below, we can see multiple variations of the brand name in the results.

```
((("p c" OR pc)
NEAR/1f (Richard OR Richards))
OR (PCRichard OR PCRichards))
NEAR/1f (Son OR Sons)
```

The screenshot shows a 'Create a new query' interface. The query name is 'PC Richard Example'. The query text is: `((("p c" OR pc) NEAR/1f (Richard OR Richards)) OR (PCRichard OR PCRichards)) NEAR/1f (Son OR Sons)`. The test query shows 3998 results. Below the query, there are three search results:

- 27 **Times Square Tomorrow - Goo Goo Dolls Official Blog** (20 Jul 2013): "...list. iheartradio presents Goo Goo Dolls live at a private **P.C. Richard and Son** Theater performance in NYC tomorrow, 9/30 at 5:30pm... this show will be broadcast live on the Jumbotron at Times Square, and recorded for later re-broadcast on Clear Channel radio affiliates across the country. iheartradio presents Goo Goo Dolls live at a private P.C..."
- 28 **Troy @Tdaddysmooth**: "I'm at **PC Richard & Son** (Milford, CT) 4sq.com/159Fzmm"
- 29 **BoomDeals @boomdealsonline**: "Up to \$690 off Create your Own Samsung TV Bundles from **PC Richards & Son** boomdeals.com/c/4403404. #boomit"

Note that there is a difference between this result and when we tried creating a query that was using the `OR` operator on every permutation of the name (method 1), that returned 147 mentions in our test query. What's the difference? The first example used the `raw :` operator and was case sensitive, so brand names in lower

case would not be in the results. This is proof that slight variations in brand name, including upper or lower case, can make a big difference in results. So why would you want to have to come up with figuring out all the combinations by hand and worry about missing any? Using Boolean logic expressions to include all variations in your criteria is far more efficient if done correctly.

## Method 2 Using Fresh Web Explorer – Parentheses Problem

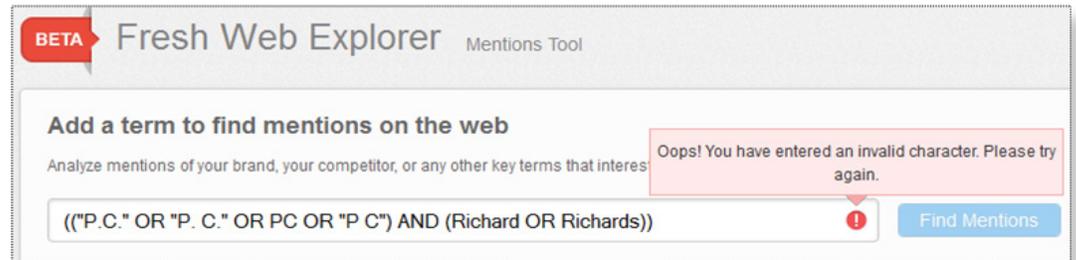
---

Fresh Web Explorer’s interface is a text field, so we should be able to put in a query with various combinations of AND and OR. However, their list of search operators does not include any proximity operator like NEAR, there are no wildcard characters, and there is no support of parenthesis. Let’s test with just the first part of our query anyway for the first part of the brand name.

---

```
(( "P.C." OR "P. C." OR PC OR "P C" )  
AND (Richard OR Richards) )
```

---



Fresh Web Explorer does not support parenthesis! That limits the use of this tool to only very specific types of simple queries. We reported this and the developers said they would add it to their feature request road map. But for now, this tool will not work for our query.

## Method 2 Using Mention- User Interface Limitation

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Because Mention doesn’t allow you to type in a string for the search criteria, that tool is not adequate for our brand name variations.

# Refining The Social Mentions Results

---

The example we used with *P.C. Richard & Son* was to illustrate how many variations your brand name may have. We could have also looked for mentions of just the *PC Richard* part of the name, or mentions of the site URL, twitter handle, etc., but for this example, we chose to limit any further complexity.

Consider these additional criteria for social media monitoring tool queries:

## Date Range

---

There are two factors to consider regarding dates:

1. Timeliness of data and
2. Ability to search mentions within a range of dates.

## How Often is Data Collected?

---

Find out how often the data is collected from the internet and see how far back it goes. Is it real time data, or are you looking at a database that has a snapshot taken earlier? Fresh Web Explorer creates a new index every 8 hours. According to Brandwatch, they crawl around 65 million sources a day to look for new mentions. The most important sites are checked every few seconds, or in real time for sites like Twitter. Sites that are rarely updated, like obscure forums and seldom-read blogs might be checked only every few hours or longer. Once a mention has been found, it will appear in the Brandwatch dashboard.

Using a small sample of social media monitoring tools, we queried a Twitter handle after sending a tweet from it and after mentioning that Twitter handle from another Twitter account. We then waited to see which of several social media monitoring tools saw the tweet first. Results were inconclusive. Sometimes the tool which first saw a mention was not the first tool to see one another time. Sometimes the mention only showed up after we changed screens or did some action that seemed to have refreshed the list of mentions. Some tweets never showed up on some tools but did on others and it wasn't clear what distinguished it to be missed versus other tweets that did show up. Some tools seemed to report mentions a bunch at a time, with long gaps in between.

Based on the inconsistent results of this basic test, we are not going to examine the results or draw any conclusions on a specific tool's performance since it is beyond the scope of this whitepaper. But it is worth noting that no tool is perfect and there is a chance that some mentions will be missed, and some will take longer to be reported than others. In cases where being thorough is critical, it may be worthwhile to also set up alerts from alternative monitoring tools to supplement your main one.

Additionally, if it is important for you to get alerts of mentions as soon as they arrive so you can respond to them immediately, then timeliness of alerts is an important requirement. See if the tool allows you to set up alerts to arrive immediately as they come in, or allows you to set up the sending alerts in batches at some regularly scheduled interval.

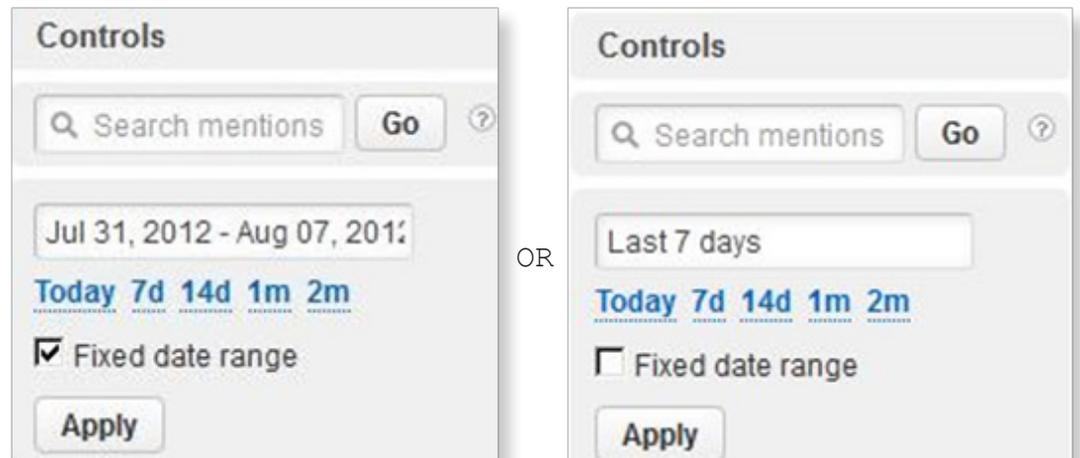
## Setting Criteria Based on Dates

---

Can you set criteria in your query or filter the results based on the dates? You might want to analyze a lot of historical data, or you might only want to see what's new in the past week or even just today.

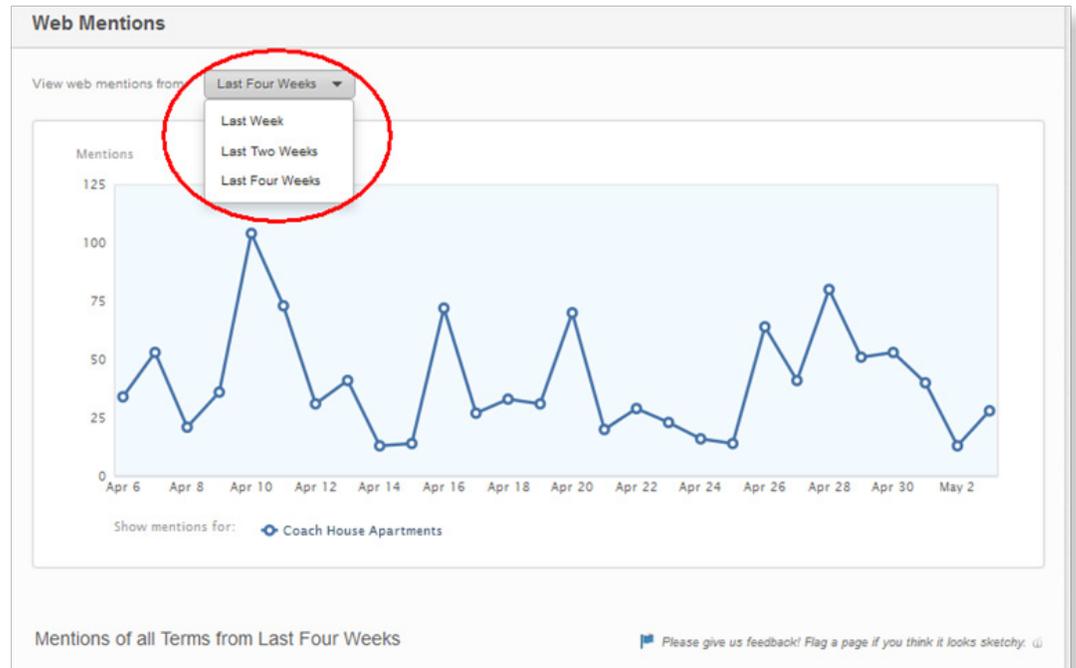
### BRANDWATCH

In Brandwatch, once you have your data, you can apply controls to it to select the dates of the mentions you want to look at. You have the choice of a fixed date range, that is, any mentions between specific dates, or a range of today or the latest 7 or 14 days, 1 month or 2 months.



## FRESH WEB EXPLORER

The Fresh Web Explorer data is a 30 day index that is refreshed every 8 hours. The tool allows you to search by the past week, two weeks, or 30 days of mentions. You cannot specify any specific date range, or go back beyond 4 weeks of historical data.



## MENTION

Mention doesn't appear to have a way to ask for specific date ranges. It will send you real time alerts whenever it finds a new mention and you can see previous mentions as far back as to the date that you created the alert for a particular query. So there's no previous history to search through. If your objective is to respond as soon as possible to social mentions and not to analyze past history, then alerts may be all you need.

## Domain/URL Inclusion or Exclusion

---

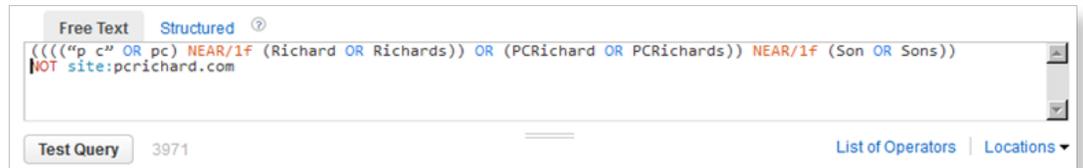
Do not waste a quota of mentions monitoring your own sites.

---

Being able to exclude specific websites in the results is useful for our example because we do not want to return mentions of the brand name on the company website. You wouldn't want to fill your list of results with every new product or sale advertised on your site.

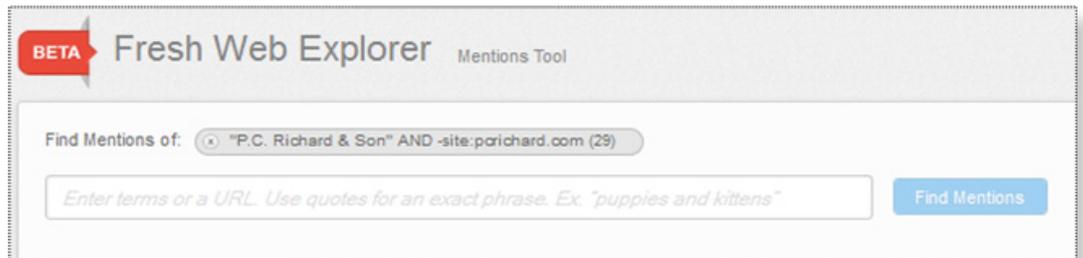
## BRANDWATCH

Brandwatch allows use of a `site:` operator to specify a domain. When we excluded the company's domain using `NOT site:pcrichard.com`, the number of mentions dropped from 169 to 133. Clearly if you are paying for the license based on the number of mentions returned, you are going to want to exclude as many as possible that you don't need to monitor.



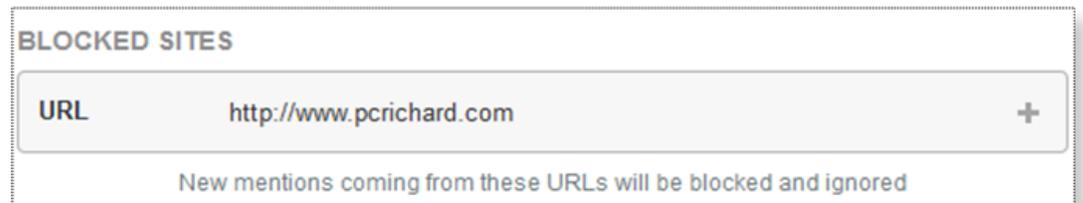
## FRESH WEB EXPLORER

Fresh Web Explorer allows a `site:` operator to include (or `-site:` to exclude) mentions from a particular site. (We used a simplified version of our query in this example since the complex variations do not work on this tool.)



## MENTION

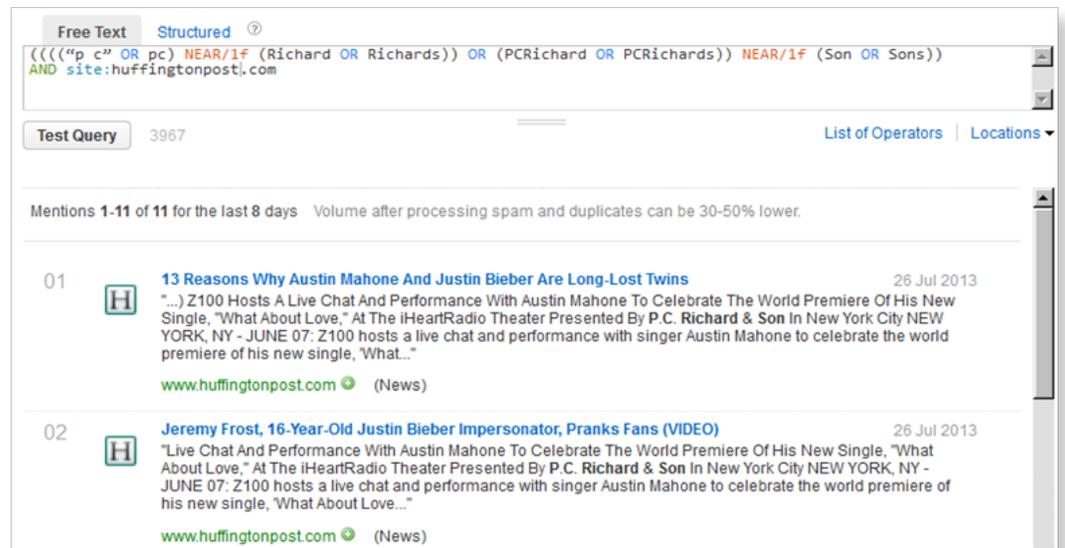
Mention provides a box for excluding websites.



If we were only monitoring social media mentions for opportunities to join conversations and engage our customers, we might want to limit the sources of our data.

### BRANDWATCH

In Brandwatch, when you create a query you can specify if you want a query from a Facebook page, Twitter feed, or a web query. If you choose a web query, you can specify the domain names of the networks you want to monitor using the `site:operator`.



The screenshot shows the Brandwatch search interface. At the top, there are tabs for "Free Text" and "Structured". The search query is displayed in a text box: `((("p c" OR pc) NEAR/1f (Richard OR Richards)) OR (PCRichard OR PCRichards)) NEAR/1f (Son OR Sons) AND site:huffingtonpost.com`. Below the query box, there is a "Test Query" button and a count of "3967". To the right, there are links for "List of Operators" and "Locations". The main content area shows "Mentions 1-11 of 11 for the last 8 days" with a note that "Volume after processing spam and duplicates can be 30-50% lower." Two search results are visible, both from huffingtonpost.com and dated 26 Jul 2013. The first result is titled "13 Reasons Why Austin Mahone And Justin Bieber Are Long-Lost Twins" and the second is titled "Jeremy Frost, 16-Year-Old Justin Bieber Impersonator, Pranks Fans (VIDEO)".

### FRESH WEB EXPLORER

We thought we could specify only the Twitter site for our search criteria in Fresh Web Explorer, but there were no results. Fresh Web Explorer does not yet support finding mentions on social networks such as Twitter and Facebook which makes it inadequate for listening to conversations on social networks.

Find Mentions of: "P.C. Richard & Son" AND site:twitter.com (0)

Enter any term; use quotes for an exact phrase (e.g., "puppies and kittens") or try search operators

Find Mentions

### Web Mentions

View web mentions from: Last Four Weeks

Mentions



No mentions of "P.C. Richard & Son" AND site:twitter.com" could be found. Try modifying your search terms or timeframe and try again.

However it did find mentions on other sites (e.g., huffingtonpost.com).

Find Mentions of: "P.C. Richard & Son" AND site:huffingtonpost.com (2)

Enter any term; use quotes for an exact phrase (e.g., "puppies and kittens") or try search operators

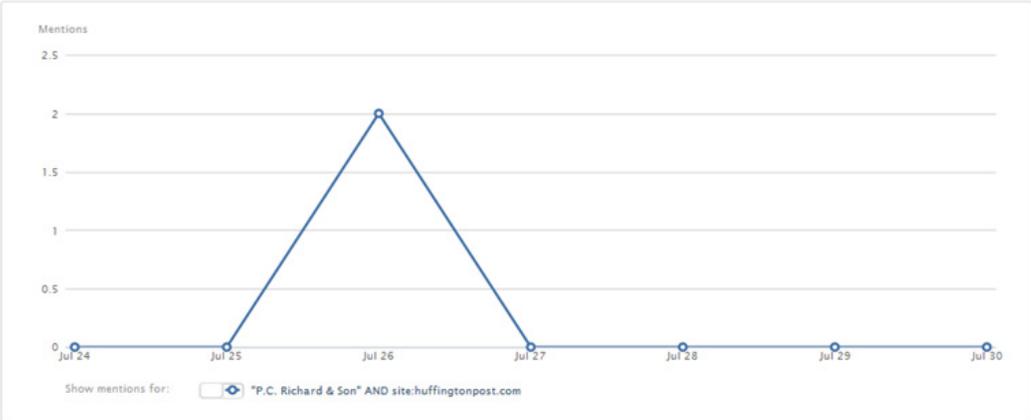
Find Mentions

Show search operators

### Web Mentions

View web mentions from: Last Week

Mentions



Show mentions for: "P.C. Richard & Son" AND site:huffingtonpost.com

Mentions of all Terms from Last Week

Please give us feedback! Flag a page if you think it looks sketchy.

Page Title / URL Containing Mention	Feed Authority	Mentioned	Date Found	
Jeremy Frost, 16-Year-Old Justin Bieber Impersonator, Pranks Fans (VIDEO) <a href="http://www.huffingtonpost.com/2013/07/26/jeremy-frost-justin-bieber_n_3600794.html?i=Celebrity&amp;utm_hp_r...">http://www.huffingtonpost.com/2013/07/26/jeremy-frost-justin-bieber_n_3600794.html?i=Celebrity&amp;utm_hp_r...</a>	83	"P.C. Richard & Son...	07/26/2013	
Jeremy Frost, 16-Year-Old Justin Bieber Impersonator, Pranks Fans (VIDEO) <a href="http://www.huffingtonpost.com/2013/07/26/jeremy-frost-justin-bieber_n_3600794.html">http://www.huffingtonpost.com/2013/07/26/jeremy-frost-justin-bieber_n_3600794.html</a>	78	"P.C. Richard & Son...	07/26/2013	

## MENTION

Mention allows you to specify the sources of your data as part of the query creation process:

**Manage and filter your sources**  
Select sources, block specific URLs, activate the Priority filter and trash unwanted mentions thanks to the anti-noise technology.

SOURCES	
Web	✓
Facebook	✓
Twitter	✓
News	✓
Blogs	✓
Videos	✓
Forums	✓
Images	✓

**BLOCKED SITES**

URL:  +

New mentions coming from these URLs will be blocked and ignored

**TECHNOLOGIES**

**Priority inbox** ✓

You can activate the "Priority" filter. This filter will identify mentions coming from influential people and important sources.

**Anti-Noise Technology** ✓

You can activate anti-noise technology if you want the application to automatically remove mentions similar to those you delete. This technology helps fight against unwanted noise that comes from spam and homonyms.

Many tools provide a built-in filter that automatically excludes any sites which look like spam from showing up in their results. Without such a filter, your results could possibly be polluted with bogus sites which will take precious time to weed through and remove.

## Geographic Location

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The [social media strategy of a local business](#) is going to be very different from that of a national brand. If your company or clients only serve a specific geographic location, or if you plan to perform trend analysis comparing social mentions from various locations, then you want to make sure the tool you choose can specify the location either in the query or later in a filter. If the tool is licensed by the number of mentions, then clearly you should limit results of the query to the location you want. Otherwise, whether it is specified in the query or the filter isn't as crucial.

For example, if your client is a professional that only serves one city or county, and he has a very common name, you may want to limit your criteria to social mentions in that geographic area as to not pollute your results with others who share his name in other parts of the country. Another example is if you are monitoring your competitor's product and want to see what sentiment their customers have in a particular geographic target market, in case there is an opportunity there to grab their market share.

## How Does the Tool Determine the Location?

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There are various ways to determine the location of the mention. The simplest way would be to include searching for the location names within the page. This isn't foolproof, as a site might assume you know where they are located or may use a different variation of the location name. For example, if you were looking for your brand name in Manhattan, you might include variations of *New York City*, but you might miss *downtown* or *Soho* in a New York City based page that assumes their readership is based in New York City.

If the location is very important to you, then you should dig deeper into the documentation for the social media monitoring tools you are evaluating and see how thoroughly they search on location.

Here are some ideas on how they may be determining location. Except for geo-coordinates from a GPS, they can usually infer the location, but that is not reliable.

- Using geo-coordinates when provided by a user (usually from a mobile device with a GPS). This is the only reliable method to determine location.
- When the location name and variations of it are displayed in text on the website.
- What time zone they are in.
- Top level domains that specify the location, such as Amazon in France is [www.amazon.fr](http://www.amazon.fr). However, some sites are using some top level domains to create catchy URLs, so a site like [www.scoop.it](http://www.scoop.it) is not actually based in Italy.
- Using the IP address of the website to determine the location of the site's host server.
- Note: some tools may consider their technology to determine geolocation as proprietary and not disclose any details.

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Understand your requirements before you start shopping for a social media monitoring tool.

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## Additional Keywords

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You may want to take the results of your query and filter it to be even more specific. See if the tool you are evaluating can filter the results based on additional keywords, or assign categories based on keywords.

For example, you may have a query to look for social mentions of a particular company's brand name and then want to do some separate analytics on different product names within that company.

## Language

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If the business or industry you are monitoring is internationally based or you care about a target audience that may speak another language, then make sure your social media monitoring tool supports foreign language websites and can determine social mentions that are in foreign languages.

## Other Social Media Monitoring Software Features To Consider

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Of course, you wouldn't be purchasing a social media monitoring tool only based on one factor. If we only cared about Boolean search operators, we could use the free and easy [Google Alerts](#). Google Alerts is free, allows fairly complex Boolean queries with a number of operators, saves your queries and allows you to edit them and emails the alerts to you. But there's no analysis, no reporting, and no way to download results into a spreadsheet.

## What do You Need the Tool For?

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Take the time to consider why you need this tool, who will be using the tool and how you plan to use it. Will it be used for one brand, or are you an agency with multiple clients who have different needs? Most users will probably fall into one or more these primary needs:

- Monitoring – finding mentions
- Alerts – notifications to allow for fast responses and [brand reputation management](#)
- Analysis – collecting the data and analyzing for trends, targeting of demographics, audience, location, platform, sentiment, keywords, etc.
- Reporting – Creating reports to present mentions and analysis in an organized manner.

## Factors to Consider

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Make a list of your requirements and highlight the ones that are must haves. The analysis of other features is beyond the scope of this document, but some other factors to consider are:

- **Analysis** – do you want the tool to analyze the results? Infer trends, determine sentiment, sort and organize data based on type of site, authorship, topics, demographics, influence?
- **Reporting** – do you need formal reports to send to clients? Does the tool report on the types of data and analysis that you need? Can you specify date ranges in your reports of chart the comparison with past data?
- **Influence** – If you are targeting influencers, is it important that the tool is integrated with some scoring or ranking service to denote reach and credibility?
- **International/Languages** – do you need support of international sites or multiple languages? Does the tool need to support users in your organization who speak various languages?
- **User Management** – will you be sharing accounts with others on your team or with your clients? Can multiple people edit or view your saved queries, projects, reports or alerts? Will you need different levels of access for different people? Do you need a site license that allows you to login and use the tool from different computers? How does the pricing differ if you have one user versus an enterprise license?

- **Alerts** – Can you save and modify alerts? Can the tool send you alerts as soon as new mentions are found? Or do you want to set the frequency of receiving alerts (e.g., daily, weekly)? Do you need to get mentions via email or text messages? Can you direct one alert to be sent to multiple people or reassign existing alerts without having to recreate them? Can you pause alerts from being sent without having to delete the saved alert?
- **Platform Support** - Does the application need to be browser based, run natively on a PC or smart phone? Does it support all the types operating systems that the users will require (Windows, Apple, Android, etc.)?
- **Mobile Support** - Is mobile or tablet support required? Think about what devices are used by the people who are doing the monitoring and receiving the alerts. Do they travel frequently? How fast will they need to respond to alerts? Does the [social media monitoring tool provide a mobile application](#)?
- **Real Time Data** – How fast do you need to react to mentions? Do you need real time data or is a lag of a few hours or even days acceptable?
- **Licensing** – How is this product licensed? Is it by user? Computer? Number of queries, brands, mentions? Which model is most cost effective for the type of usage you will need? If installed on a computer, is usage restricted only to that one computer? Are there multiple people working on the same single account? Are you likely to do queries that return hundreds or even thousands of mentions? Are there different tiers so you can start small and upgrade if you find the tool useful? Is there an evaluation license available so you can be sure the tool will work for you and be worth the investment?
- **Help/Support** – Is there an adequate user guide or some kind of contextual online help? Are there user forums to discuss and solve each other’s problems? Is there a direct way to contact support with trouble tickets, live chat or email? What is the turnaround time to get assistance? Is one-on-one support included in the price?

One is not likely to find all the information you need to make your decision based on what you can find on the product websites. It is important to get a trial period to try out each tool with some real life examples to see if it will meet your requirements. This is also a good opportunity to see how responsive the product’s technical support team is. Also consider if the people who will be using the tool will be able to easily learn how to use it effectively. To employees with a math or computer science background, constructing advanced Boolean query strings will be obvious. To others, it may look like rocket science. Involve the future users in the product trials to see how much of a learning curve will be needed to adopt that new tool into the social media process of your business.

# Conclusion

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Based on the nature of what you need to monitor, it is clear that having a flexible and effective Boolean search query is the key to the usefulness of any social media monitoring tool.

- We've reviewed the concepts of the Boolean search query and how it works in a sampling of social media monitoring tools.
- We've seen how each social media monitoring tool has a different selection of Boolean search operators and other operators which help fine tune an advanced query.
- We have also seen that most tools provide additional filtering capability to help narrow down the social media query results even further. Lastly we provided a list of other features to consider based on your requirements when doing a social media monitoring tools comparison.

There are many social media monitoring tools out there, and they vary widely. New tools are released often and existing tools are updated frequently. There are lots of articles on the internet with reviews and social media monitoring tool comparisons, however, most do not get into depth about the capabilities of their Boolean search query functionality. So if you are [evaluating social media monitoring tools](#), it is worth the due diligence to find out what kind of advanced query functionality they provide to be sure your requirements are satisfied.

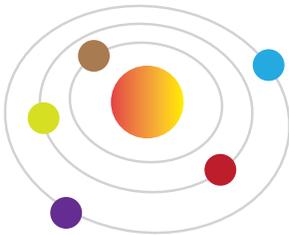
With this information, you should now have a clear idea that choosing a social media monitoring tool is far more complex than just seeing that they monitor social networks and other sources on the internet. The most important functionality in social media monitoring is the robustness of the tool's Boolean search query. Being able to drill down to precisely what you want to monitor and not open the flood gates with irrelevant results saves time, effort and money, and makes the analysis of the results more accurate.

## About The Author

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Jannette Pazer has over 20 years in the software industry as a software engineer, system test architect, project manager, and now is a digital marketer at [DragonSearch](#). Outside of work, Pazer is an avid adventurer, rock climber and blogger. Follow her on Twitter [@sociallyclimb](#).



Need help with your digital marketing needs? Discover more about DragonSearch at [www.dragonsearchmarketing.com](http://www.dragonsearchmarketing.com), or drop us a note at [hello@dragonsearch.net](mailto:hello@dragonsearch.net).