CHAPTER ELEVEN

Pick Your Spots: Planning Social Marketing Campaigns

Here's an all-too-common situation we encounter when going in for an initial client consult: the company has been experimenting with various social media platforms for a year or so; it has a blog, a Facebook fan page, a LinkedIn presence, and a couple of Twitter accounts. Marketers had big expectations, but their performance has been underwhelming; the blog gets about one treasured comment per month, Facebook fans topped out at around 90, and Twitter followers are in the low triple digits. The company is frustrated, the marketing director is on the hot seat, and top executives are questioning whether this whole social media thing is just a waste of time.

The time-waster isn't the media, but rather an undisciplined approach to using it. In these cases, the companies have been experimenting, which is a good thing. The barriers to entry for social tools are so low that you should be constantly testing new ideas. Follow up on the promising technologies and quickly discard the ones that don't have much value. However, there is no overarching strategy. The tool has become the goal rather than the means to a goal. Marketers have either bought into the hype because they've been told that social marketing is a panacea or because they're playing a game of Follow the Leader with their competitors.

Social marketing takes discipline to achieve results. Simply showing up and dabbling won't work. Case in point: In a *BtoB* magazine 2010 survey of 387 marketers about their use of Twitter, 54 percent reported posting tweets once a week or less. Among that group, 51 percent indicated they were satisfied with the return on investment (ROI) of Twitter. In contrast, respondents who posted at least once a day reported satisfaction rates 10 points higher. Similarly, respondents with more than 5,000 followers reported a 77 percent satisfaction rate, whereas those with fewer than 500 reported 51 percent satisfaction (see Figure 11.1).

The point is clear: Results come from only frequent and purposeful use of tools. You need a strategy.

"Strategy" is a loaded word in big companies. It implies hours of meetings, months of research, and thick reports that nobody reads. We don't wish that on you. We're talking about a strategy that supports a short-term goal like increasing leads 50 percent in 12 months. It means constant experimentation, revision, and the willingness to discard ideas that aren't working.

This new approach is well summed up in the title of the book *Do It Wrong Quickly* by veteran IBM technologist and marketer Mike Moran. "The way to eventually do it right is to admit that what

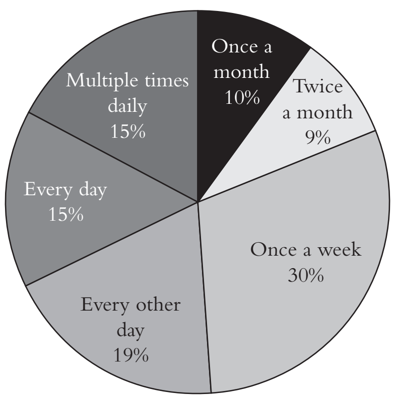

Figure 11.1 How Often Do You Post Tweets?
Source: BtoB magazine.

you are trying right now is probably wrong," he writes in the preface. "We need to accept the fact that our first try will stink on ice, and then we'll start making it better so that it stinks a little bit less each day." When your mistakes aren't expensive or embarrassing, then you won't worry so much about making them. The good news about social marketing is that mistakes are rarely expensive.

Strategy is sorely lacking in most social media programs we've seen. In most cases, clients come to us asking how they can get going on Facebook or Twitter. We tell them that's the wrong question. *Successful social media strategies never presuppose the use of social media.* In fact, we find that in many engagements social media are only a small part of the optimal program. Marketers are often delighted to discover that tactics that they know well, such as media relations, public speaking, and e-mail marketing, often have more utility in achieving their goals than social media. A blog is, after all, is only a tool, and tools are useless unless you know what to do with them.

This idea goes against the grain of American thinking, for we are a nation of gadget lovers. We like nothing better than to glom on to some new electronic bauble and then figure out what to do with it. Of course, a lot of these toys never turn out to have much value at all, unless, of course, you're eBay.

We can't run our businesses that way, though. There are far too many tools out there for anyone to comprehend. Mastering a few is better than being incompetent at many. Although social marketing tools themselves may be free to use, the resources required to use them properly aren't. The tools you choose to master should be the ones that will move you most quickly toward your business goals. Ask any good plumber to describe his toolkit, and he'll tell you in detail what every wrench, cutting tool, and tin of soldering flux is for. Plumbers can't afford to carry around stuff they don't need. Neither should marketers.

A Four-Step Process

Tool selection should be the natural outcome of a process that begins with goals and works backward to tactics and technologies. *The choice of tool should be one of the last decisions you make.* (See Figure 11.2.)

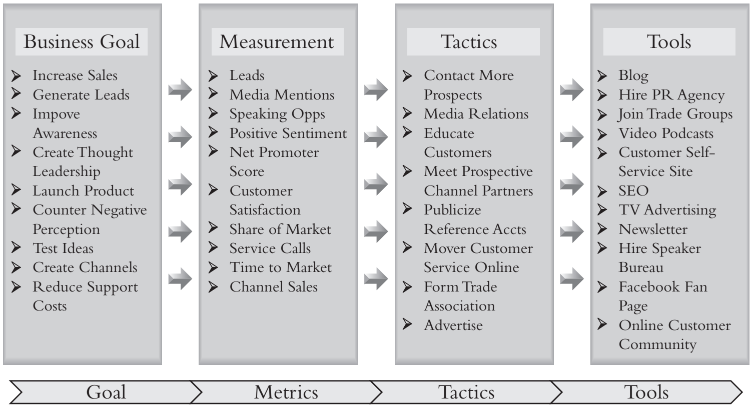

Figure 11.2 Four-Step Process for Social Media Selection.

Most companies we've encountered go about it the opposite way. They jump into blogging or Facebook with the hope that some magic will result. But as the social universe grows more and more crowded, the likelihood of succeeding with this unfocused approach becomes more remote. When you build a house, you start with a plan, create a process, and then choose the construction materials and tools. Doing it the other way around would be crazy. Marketing strategy works the same way.

Why Numbers Matter

A lot of marketers were English majors in college, which isn't surprising given that marketing is a communications-intensive discipline. Unfortunately, the people who allocate marketing budgets were usually accounting majors.

You don't need to know how to read a cash flow statement to succeed in marketing, but it sure helps these days. Too often, the objectives of marketing programs are expressed using vague terms like "improve" or "expand." Plug either of those terms into an Excel formula and you'll get an error message. You have a much better chance of getting budgeted if you can set measurable and achievable goals backed by agreed-upon assumptions about the steps needed to achieve them.

We believe that nearly everything can be measured, although sometimes you have to get creative about tactics. The mere fact that you're measuring results will make your chief financial officer (CFO) smile. In Chapter 14, we share some simple approaches to calculating return on investment.

The four-part process we outline here is big on numbers because that's the language that executive management speaks. It's also big on not letting numbers become a pair of handcuffs. Revise, iterate, and seek cause-and-effect relationships that help you improve future programs. Your CFO will give you credit for making the effort.

The process depicted here is one way to go at the task. Start with the business goal, choose metrics, define tactics, and then select tools at the very end. We've had good luck coaching our clients through this process because it forces them to make their decisions in context. Decisions are a lot less risky if you have a good reason for making them, and this model puts all the reasoning at the front. Let's look at it in more detail.

Business Goal

Start with an objective, and we don't necessarily mean revenue. Goals can range from improving brand awareness to correcting misinformation to generating leads to reducing costs. If achieving the goal involves some kind of communications, there's probably an online dimension to the process, but that may not be social media.

Be specific at this stage. Setting a goal like "increase sales" is too general because there are far too many ways to attack the task. A better goal is "increase sales of left-handed finambulators 50 percent by expanding distribution channels." The more specific you can get at the front, the easier the rest of the process will be. Apply metrics at this stage if you possibly can. Your goals aren't set in stone; they're merely guidelines to use as you work through the process and make adjustments.

Measurement

This is the ugly, contentious, blood-on-the-walls part of the process because it requires stakeholders to agree on what metrics will be used to determine success. Be disciplined; select three or four elements to measure, but no more than that. Remember, you can always change metrics later. The important thing isn't so much to pick the right yardsticks as to make sure everyone agrees on them.

People get unbelievably worked up about metrics, particularly if their job is to deliver leads. That's why it's important that all stakeholders agree on the metrics that matter. Many companies set goals arbitrarily by fiat. People are handed targets that they know they can't achieve, which makes them disillusioned and negative and thus less likely to achieve their goals. In contrast, people work harder to achieve goals that they've agreed are possible.

Don't set measurements by e-mail or wiki or other nonconfrontational tool. The best way to get the job done is to sit people down in a room (it's okay if a few are on a conference call) and let them talk it out. Write the agreed-upon standards on a whiteboard and then distribute the notes to everyone to reconfirm what they agreed to. It's helpful to have a good moderator involved in this process, someone who can see points of alignment and achieve compromises. Otherwise, you can waste a lot of time arguing over details. Also, remember that nothing is set in stone at this point. You can always adjust metrics later with everyone's agreement.

There are lots of great online metrics you can use. Many people still use traffic and page views, which have value, but keywords, bounce rate, time spent on site, pages per visit, and repeat visitors are all better indicators of audience engagement. This is particularly true for business-to-business (B2B) companies, many of which work in very focused industries. The niche company will never have big traffic numbers, so the goal should be to better engage the audience they do have.

Here are a few online metrics you can use, classified by the goals they represent:

Awareness	**Engagement**	**Influence**
Page views	Time spent on site	Sentiment analysis
Referring URLs	Bounce rate	Retweets/shares
Inbound links/ Trackbacks	Pages-per-visit	Bloglines/Blogpulse/ Technorati rankings
Unique visitors	RSS subscriptions	Compete/parody videos
Social bookmarks	Comments	Mainstream media endorsements
Search performance	Discussion group posts	Share of online mentions
Web visibility ratings (Compete, Alexa)	Contest entries	Inbound links/Trackbacks
Brand references	Friends/followers	Extended reach[1]
Video viewership	Insite search	Embeds
Mainstream media references	Return visits	Client recommendations

All of these indicators have value in different scenarios, and you should make an effort to understand that value before committing to them. We advise against relying too much on simple numbers like page views and visitors to assess performance. Our friend and colleague Shel Holtz has referred to the oldest web site metric—hits—as an acronym for "how idiots track success." It's easy to manipulate basic metrics to increase traffic temporarily. However, not all traffic is good traffic, and there are plenty of ways to attract "drive-by" visitors who are of no value to you. Third-party referrals and visits from people who spend time on your site and click through to a number of pages are better indicators that your message is hitting home.

Don't get stuck on using online measurements either. It's perfectly okay to count newspaper articles, seminar attendance, speaking invitations, and television impressions as indicators of progress. Remember that we're not seeking a way to apply the Internet; we're seeking a way to reach a business objective. Ultimately, the value of your online social community may be intangible, but it is not without value.

Tactics

This is the fun part. Once you've agreed on the metrics you want to use, it's time to map them to tactics. If you've done your homework on measurement, this stage should be pretty easy. Just remember to align your tactics clearly with the standards you'll use to measure success.

Here are some examples:

Metric	Tactic
Increase white paper downloads 50 percent	Add link to white paper on web site home page Promote download in monthly e-mail newsletter Promote to 10,000-name prospect list Promote through company and employee blogs Promote through Twitter use
Double volume of mainstream media references	Double public relations agencies retainer and targets Secure speaking engagements at four industry trade shows Follow and interact with top 25 targeted journalists on Twitter Launch topical blog in area of media interest
Decrease negative online mentions by 20 percent	Purchase and install conversation monitoring software Assign two staffers to respond to all online comments by e-mail and Twitter Track and report on all contacts with online influencers
Increase channel sales by 30 percent	Make courtesy call to each channel partner in first quarter Launch channel partner newsletter Lower volume discount thresholds Initiate channel blog Launch channel partner community

As you can see in these examples, social channels are only one of several ways to get the message across. Once you select tactics, you can then set priorities based on time, budget, staff resources, and likely impact. You can even create a project chart like the one that follows to help measure the impact of specific promotions on prospect response.

White Paper Promotion Timeline												
Task	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Home page link												
E-mail newsletter												
Promotional e-mail blast												
Blog promotion												
Twitter messaging												

Tools

If you take care of the first three steps in this process, the final one should be obvious. In the last example, the company web site, e-mail newsletter, company blog, employee blogs, and Twitter are the key tools. The biggest questions are tactical: which weapons do you deploy first and how? In general, you want to start with the tactics that are the most familiar to you while coming up to speed on others. However, don't let that approach become an excuse for falling back only to what's comfortable. Every marketing organization should be ramping up with new tools these days, so be sure to work at least one social platform into the mix, if only for the purpose of educating your staff.

Experiment with the mix and deployment schedules of the tools you use. Stagger the rollout of some of the program elements so you can more clearly measure performance. For example, if an e-mail blast consistently triggers a 20 percent rise in visits to a landing page, you may want to schedule an e-mail to coincide with the addition of new content to see if that number changes. Or perhaps you find that combining an e-mail blast with a Twitter promotion yields a bigger boost to your key metrics than using those tools separately. E-mail service provider Infusionsoft has an innovative tactic: Marketers test two different headlines on the same blog entry and tweet each to a different Twitter list at different times of the day. This inexpensive form of A/B testing helps them write more compelling headlines and to identify topics that resonate with customers.

You can also use tools in combination with one another. For example, a new entry to the blog can also be cross-posted to Facebook, LinkedIn, and Twitter. Try staggering those incremental messaging tools as well by inserting a couple of days between each. In other words, post to Facebook on Tuesday, LinkedIn on Thursday, and Twitter the following Monday. This will give you an idea of the lift that each of these tools delivers. If you have multiple Twitter accounts, you can stagger those as well. Through this kind of experimentation, you'll learn what kind of lift you get from each channel. This enables you to make smarter decisions about combining them in the future.

This four-step process is by no means the only approach you can take to tools selection. A colleague of ours counsels his clients to switch the two steps in the middle so that tactics are selected before metrics. That's okay, too. What's critical is to always start with goals and make tool selection the final stage of a logical progression.

Process in Practice

Let's look at how the four-step process was used in a real-life scenario with a B2B client that sells parts used on large manufacturing lines. The company had recently introduced a new product to a market in which it had not previously been a major player. The product was selling slowly because of the company's poor name recognition in that industry. The product team was charged with increasing full-year sales of the product by 50 percent, but that goal was too broad to be actionable. We had to narrow the objective enough to permit us to select a limited domain of metrics.

Teasing out the opportunities, the product team settled on marketing to a group of influencers who don't actually buy the product but whose opinions can carry enormous influence. They are the process designers who work with manufacturing companies on setting up complex systems. These people are very knowledgeable about the technologies needed to implement their designs.

The team believed that the company's mind share with these designers was a weakness; they estimated that only about 10 percent of these professionals were even aware that the company had products in this market. If they could tap into this influential group, they could make significant progress toward the overall 50 percent growth goal.

Little was known about the target audience, but the team agreed that if it could double the size of its prospect list, it would consider the project a success. Remember that the goal at this stage was not to find the *perfect* metric, but to identify targets that the entire team could agree on.

Leads would be captured through white paper downloads, e-mail newsletter subscriptions, and "send me more information" appeals on the web site. Doubling the size of the existing mailing list of about 2,500 people would require attracting about 50,000 visitors to a web page over the course of the next year, assuming a 5 percent click-through rate to a registration form. Web traffic should grow steadily when backed by the right promotion and search optimization techniques, so the team estimated that a progression like the one depicted in Figure 11.3 was reasonable.

Creating awareness also meant building a presence in offline media, including trade publications and events. No hard metrics were available to correlate such activities to web traffic, but the team believed a goal of six mentions in prominent trade publications and four speaking appearances were achievable during the next year.

So now we have our three metrics in place:

1. 50,000 web site visitors in defined quarterly stages
2. 2,500 e-mail registrations
3. Six trade press mentions combined with four speaking opportunities

It was time for tactics.

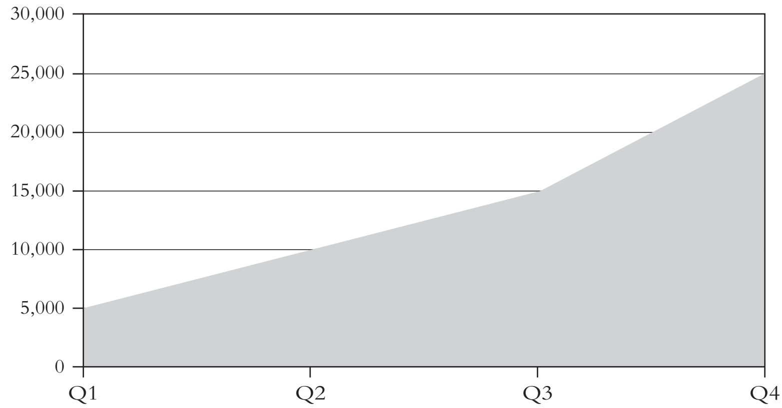

Figure 11.3 Projected Web Site Traffic Growth.

The company had little brand awareness with the target audience, so we came up with the idea of a survey. Research is a great multi-faceted marketing tool, because it builds awareness with the audience being researched while also delivering insight on the group's interests and potentially even a few nuggets of news that could be shared with the media.

The first step would be to build a page on the corporate site that was targeted specifically to the designer audience. This would consist of helpful content provided by product developers and marketers, along with links to interesting information from other sources. The team resolved to reach out to bloggers who write about process control (yes, they are out there!) and ask to syndicate some content from their blogs. This would have the ancillary benefit of building awareness with that audience while creating inbound links that would drive search traffic. The team would also commission two white papers from freelance writers with expertise in this area and make those content assets available as free downloads to visitors who filled out a short registration form. Traffic would be driven by existing communications, word of mouth, and e-mail blasts to two 10,000-name mailing lists rented from a leading industry publication.

Finally, the company would launch a monthly newsletter aimed at the designer audience. Content would consist primarily of articles from employees and bloggers. It would also feature updates on new product developments. The newsletter would be promoted in existing print advertising and through a pilot pay-per-click advertising program.

Speaking of search, the team also created a small committee to develop a list of 7 to 10 keywords that would improve search engine visibility. These terms would be applied across the site to tags, headlines, and other areas that search engines care about.

Finally, the public relations agency would be given the objective of reaching out to industry publications with bylined articles about process control. This would help establish that the company was in the market and develop some thought leadership. The agency would also research and propose speakers at relevant industry conferences.

Now our four-step process was complete with a priority list that looks like Figure 11.4. It turned out that only a few social media tools were appropriate. Much of the work related to conventional web site development, public relations, and blogger outreach. The team planned to convene every three months to review progress. At those meetings, everything would be open for discussion. They could revise their goals, change their standards of measurement completely,

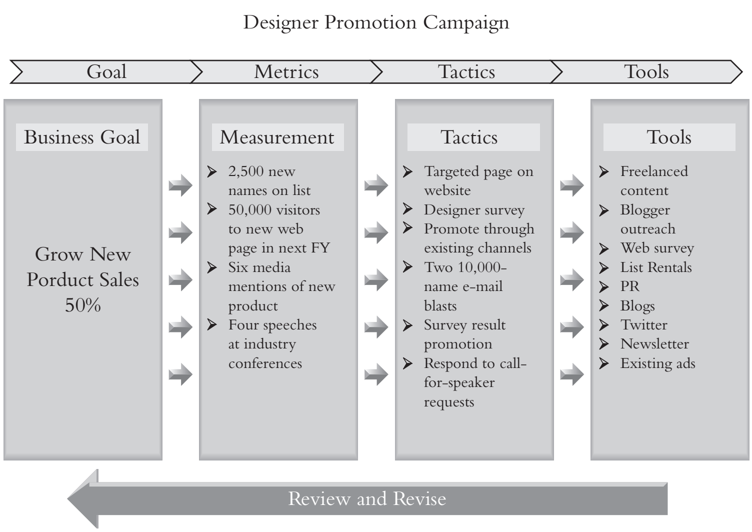

Figure 11.4 Designer Promotion.

or stay the course. As long as they agreed on goals and metrics, everything else should fall into place.

The four-step process may seem clumsy and time-consuming at first, but as you become comfortable with it, you will quickly learn to apply it to simplify selection of all the tools you use, whether or not they include social media. Just remember to start with the business goal. It makes the rest of the process much easier.