A Non–Techie's Guide to Choosing Platforms

In its 2010 Trust Barometer, the giant public relations firm Edelman asserted that because most people see all stakeholders as equally important and because people need to hear something multiple times to be convinced of its veracity, companies should "be everywhere, engaging everyone."

But the reality is that given the explosion of social media sites and the amount of time organizations have to invest in them, you need to focus your resources on those social media channels most likely to deliver a return. In B2B marketing, where purchasing decisions can be major commitments that require educating multiple stakeholders and building group consensus over the long term, picking channels with longevity is key.

The conundrum is how to maintain relationships with those customers using platforms that are here today and may be gone tomorrow. Interruptions compromise sales. If you wind up on an obsolete platform, you will face the task of moving your data elsewhere. That's a complex process, and it is particularly disruptive to B2B marketers, because sales cycles are longer and purchases are more heavily considered. If you lose

access to your customer interaction history, it's difficult to keep prospects moving through the sales funnel.

In this chapter, we walk you step-by-step through the process of mitigating the risks associated with selecting a platform to host a destination web site.

Destination Web Site as Home Base

In social marketing, your corporate web site is your home field advantage. As a source of official company information, people trust what you say about yourself at your own domain more than they do on your Facebook company page. After all, anyone can launch a Facebook page, but only your organization can upload content to its own destination site. A December 2008 study by Forrester Research analyst Josh Bernoff reported that a scant 18 percent of U.S. Internet users say they trust social networking site profiles from a company or brand.[1] Half of industrial buyers have selected one supplier over another primarily based on the capabilities of that supplier's web site, according to the 2008 ThomasNet Buyer-Seller Disconnect Study by Outsell, Inc.

John Shea, new media director at the Federal Emergency Management Agency, endorses this principle. "If you're concerned that information came from a social network, look back here to the FEMA.gov website so you know it's authorized information," he says. "A lot of what you see out there are folks who pretend to have the right information, or think they have the right information, but there's nothing that says its official unless it can be verified on a .gov site." That doesn't mean you should avoid public networks, but back-end those conversations with content on your official site as well.

Think of your web site as the homeland, and your presence on social media services as embassies, suggests Steve Rubel, SVP, Director of Insights for Edelman Digital. You should build relationships via social media, but without neglecting the importance of driving people back to a place where you can have more influence over the conversation.

Use social networks at the top of the sales funnel. If your objective is to generate leads, seek out conversations happening in public spaces, give out free advice, and entice people to follow you home. The page they land on should both validate what was said on the social network and encourage them to take a desired action.

"If you're making money through e-commerce on your corporate site, why would you be so quick to send traffic away?" asks Jeremiah Owyang, partner at the Altimeter Group. "Most companies say it's because they want trust or word of mouth, but they haven't thought through what that actually means."

Control the Interface, Not the Conversation

Most of the worrying we hear from companies about social media engagement centers around the bad things people might say about their product or service online. But what's more important is where they say it. If it's on your own destination web site, you're in a better position to refute misinformation and convert conversations into transactions.

If you make your destination social so stakeholders can converse about the business in which you compete in your homeland, you generate editorial content against which you can promote your own products and services. Think of how you can leverage content and conversation on your own site to promote your company in context.

Content Management Systems

Before you start tweeting links back to your corporate site and inviting people over, clean up your house first. Start by choosing a content management system (CMS).

A CMS is a platform for managing web content. A blog is an example of a simple content management system. So is Twitter's 140-character tweet field. A CMS lets you create and format content to display on a web site.

A CMS can come in all shapes and sizes. What's important to know is that you don't have to reinvent the wheel. There is a vibrant industry of packaged CMS platform providers and chances are there's more than one that's right for you. But regardless of the CMS you select, two things you need for sure are data portability and interoperability.

Data Portability and Interoperability

Interoperable systems play nicely with others, so they're compatible with other types of software. Having data portability means you can easily back up your data or migrate your content and contacts to applications like customer relationship management (CRM) systems or another CMS in the future.

When you use popular social networking sites, you relinquish control of your customer data to the service provider. Social networks like Facebook have a vested interest in tying you to their platform, so most don't make it easy to move data elsewhere.

For example, if you use Facebook Events to invite your "friends" to a webinar, the attendee list is excruciatingly difficult to export. If you ran into someone who attended your webinar at a trade show a year later, you'd like to be able to pull up his customer card and see a history of your interactions. CRM software enables this, but if you rely exclusively on third-party web 2.0 services, the task is nearly impossible.

There's also no guarantee that a third-party social network will be around for the long term. In 2002, a social networking site called Friendster was all the rage. The next year, its dominance was usurped by MySpace, which was trumped by Facebook a few years later. Today, Facebook looks unstoppable, but so did IBM in its heyday. The fact, no one knows what's next. Make sure your customer data and interactions can be exported in an interoperable format.

We've seen numerous cases in which marketers were surprised to discover that their corporate site couldn't easily be integrated with their CRM or e-commerce service. Here's how to make sure that doesn't happen to you.

Getting Ready to Pick a Platform

One big reason companies fail at platform selection is because they delegate the task to an internal information technology (IT) department whose primary function is infrastructure, not interface. Marketers need to be closely involved in providing guidance on business needs. Writing out detailed business requirements based on case studies is a complicated process. It can be long and tedious, but believe us when we say it's absolutely critical. You need to think about what features you will need 2 to 3 years from now and write them into the needs definition from the start. Otherwise, your destination site will become a pair of handcuffs when you seek to expand it. You can't choose the right CMS if you don't know what you need it to do.

Start by interviewing representatives from different departments in your company to gather requirements and determine current and future use case scenarios. Work with a user interface designer to translate business requirements into functional specifications and web site wire frame drawings, which are line drawings showing specifically how the site's interface will work.

For example, you may not need the ability for customers to easily share the e-commerce transactions they make on your web site on Linkedin today, but you may want that functionality in the future. It's difficult to think ahead to all the possible options, but choose a platform that's interoperable enough to support the most likely scenarios. Look for a robust ecosystem of third-party plug-in providers.

Platform Options

When choosing platforms, you have four basic options:

1. Public web 2.0 services such as Blogger, Flickr, and YouTube
2. Licensed proprietary or open-source software such as Microsoft SharePoint or Joomla
3. Software as a service (SaaS) providers, which lease access to a proprietary platform that's hosted on the Internet
4. Homegrown applications

It's difficult to imagine a scenario in which the fourth option makes sense these days. The homegrown option is expensive and risky, and failure rates are high. We recommend against do-it-yourself solutions unless the features you require are so highly specialized that no viable commercial alternatives exist. Frankly, with the exception of the US Department of Defense, which is building its own CMS for security reasons, we haven't encountered that situation yet.

Public Web 2.0 Services. It's possible to build a destination web site on the back of public web 2.0 services like Google's Blogger, Yahoo!'s Flickr, YouTube, and Facebook. Blogger lets you point your domain name to your blog so your pages are parked at your domain. You can design a custom template based on your brand identity. The aesthetics of a YouTube channel can also be customized to a certain extent. You can even use public services to back-end your web site. For example, you can syndicate Flickr photos and YouTube videos on your own pages or use Facebook Connect to make it easy for visitors to register and collect Facebook Friends instead of customer profiles in a CRM database.

Public web 2.0 services are easy to use, require no client-server maintenance or software updates on your part, and can be deployed in minutes. You sign up for an account, publish content, and never have to worry about installing security patches, upgrading the CMS or managing a server.

However, you have no control over back-end functionality or navigational hierarchy. There's no version control, archiving, or work-flow management. Data portability and interoperability are intention-ally restrictive because the providers want to lock you in. It's difficult to market around your content because the site operator is already doing that for their advertisers, who underwrite the cost associated with maintaining your "free" account. These services also often have weak support for nonpaying users or no support at all. If you have a problem, you're on your own.

This happened to one of our clients: Her organization's 1,000-member Facebook page inexplicably disappeared because, she was told, it violated Facebook's terms of service. There was no further

explanation from Facebook, and it was months before she was able to reach someone at the company who could resolve the problem.

Terms of service may absolve the public network from any liability for problems. Here's a passage from Blogger's contract: "You agree Google has no responsibility or liability for the deletion of, or the failure to store or transmit, any of the content and other communications maintained by the service. Google retains the right to create limits on use and storage at our sole discretion at any time with or without notice." In other words, Google has no liability for anything that happens to your Blogger data. (In fact, there are ways to back up and export Blogger data, but Google doesn't make that easy to figure out.) And if they want to impose other restrictions on usage in the future, they have reserved the legal right to do.

Licensed Software. The second option is to license software and host it either on your own servers or externally with a web hosting company, also known as a co-location provider. If you host a site yourself, you have to provide for the time and expense of installing security updates and software upgrades, arrange for backup and disaster recovery, and build the necessary infrastructure to support growth.

The license-and-install option requires extensive IT support, but once the site is up and running, you have considerable autonomy and flexibility. There are two categories of licensed software: proprietary and open source. In the case of proprietary solutions, you pay a licensing fee to use the software. In the case of open-source software, you pay no licensing fee but are responsible for customizing, deploying, and hosting. This sometimes carries considerable cost. Many vendors, such as Jive and SocialText, offer both on-premise and hosted (SaaS) options.

If you go the licensed software route, spend the money up front for a functional specification and produce wire frame diagrams to illustrate desired functionality. You will make a significant up-front investment, so be sure the platform will serve your purpose. Since the implementation costs are front-end loaded, you've got much more to lose if the platform underperforms, because you're not going to be able to use it until most of the work has been done.

Be precise about the functionality the vendor needs to deliver. For example, you might specify that the platform should support streaming webcasts with text chat and polling, automatic importing of attendee names into your CRM system, and synchronization with your e-mail marketing application. Schedule dedicated time to test the completed system and ensure that those features work and don't sign off on delivery until you've assured they function at the scale you need.

Provide complete specifications up front. The vendor is under no obligation to implement new features that weren't in the original contract. If you're depending on the new system to be working by a certain date to support a product launch or trade show, write that into the contract and be sure the vendor has a contingency in place in case it misses the deadline. Grand plans are derailed by details, so sweat the little stuff.

Software as a Service. SaaS services are accessed over the Internet, usually from a browser. The advantage of SaaS is that the service is less expensive up front and provides the latest features without the hassle of software installation and testing. The provider earns its keep by demonstrating value over time, because the cost and trouble of switching platforms is relatively low. Time to market is also faster, because the SaaS provider has the software and hardware in place and has usually deployed the platform successfully for other clients. Salesforce.com, CrownPeak, HubSpot, and iPressroom (which Eric founded and sold in 2009) are some of the hundreds of providers that deliver their products as services.

Another advantage of SaaS is technical support. Most SaaS vendors offer so-called service-level agreements (SLAs) that guarantee uptime, customer response times, and service quality. Read these agreements carefully, though. Many vendors don't guarantee SLAs beyond giving back a couple of months' worth of free service, and no vendor will compensate you for lost business. Specify the largest penalties for nonperformance that you can get.

The big downside of SaaS is that you've got to keep paying as long as you're on the platform. Also, some internal IT organizations prohibit the uses of hosted services outside the firewall. There is some

risk involved because vendors may fail or be acquired. Perhaps most important, the data on a SaaS platform doesn't live on your site. If you go the SaaS route, be sure to obtain an ironclad guarantee that you can get your hands on that data whenever you need it.

Use this Q&A to help decide which platform is right for you.

1. **What measurable actions do I want prospects to take?**
   The answer to this question determines the feature set your platform needs to support. If you want to use a public social network to help customers educate and support themselves, consider a platform like Jive or WetPaint that lets participants easily add to a shared body of knowledge. If you want to enable people to collaborate, you'll need a platform that supports activity streams, like the newsfeed on Facebook or the tweet stream on Twitter. If you want to build landing pages that send leads to another system such as Salesforce .com, you'll need a CMS that's interoperable with your CRM package.

2. **What specific functionality do I need?**
   For example, if you plan to display banner and tower ads alongside your content, you need a platform with ad server functionality, including the ability to rotate ads dynamically. If you plan to create a lot of your own content, you'll need to be able to specify page titles and metadata for search engine optimization. If you want to send e-mail newsletters to an opt-in list, you'll need a system that supports e-mail marketing or that can be integrated with a third-party e-mail marketing system. Think of everything you might ever want to do with your service and specify it in the front-end definition. It's a lot more expensive to add features later than to demand them at the outset.

3. **Am I tech savvy enough to support myself?**
   If you are technically proficient enough to customize a site to your liking, go with an open-source CMS platform like Drupal, Joomla, or WordPress. There's no software license fee, and the open-source community protects you

against obsolescence. Major B2B marketers like Cisco and IBM use open–source platforms, so these systems are tested and proven.

If you have budget but no support, go with a SaaS provider and negotiate an SLA that gives you as much support as you think you'll need. If you've got no budget and no support, public web 2.0 platforms are your only option.

4. **Does the internal IT organization have the resources to support me?**
   If you've got the technical resources on staff but you're competing with other projects, you could hire an outside firm to get you up and running on licensed software, but it's going require a heftier up–front investment than using a SaaS provider. However, you also have more control over the final outcome. Support may be more challenging because added fees are involved and systems integrators are also pulled by obligations to other clients.

5. **Do I need regular offsite backups?**
   If you go the license-and–install or cloud–hosted route, make sure you maintain an offsite backup in safe locations where you can get to it. If you go with the SaaS approach, get assurances you can make a copy of the data whenever you need it.

6. **Do I need disaster recovery?**
   Disaster recovery allows you to maintain backups of your web site in remote data centers. If one site goes down, another site automatically takes over. SaaS providers have this feature built in. If you host the site yourself, you need to make your own arrangements. If you're hosted on a public web 2.0 platform, the decision is out of your hands. While major public platform providers generally have good infrastructure in place, none that we know of will guarantee against data damage or loss.

7. **How quickly do I need problems resolved?**
   When your web site is down, minutes can seem like hours, so think about how much downtime you can withstand. Systems integrators and co–location vendors usually provide

several classes of service, ranging from instantaneous to lei-surely. The faster the response, the higher the price. This is one advantage of SaaS solutions. Those vendors can't afford downtime, so they invest considerable resources in reliability and redundancy.

8. **How compatible does the platform need to be with my company web site?**

You don't need code-level compatibility. You can load tem-plates that match the look and feel of your existing web site into a CMS, redirect from an existing domain, and achieve nearly seamless integration. But if you want the headlines from your blog posts to appear on your corporate home page or clicks from the blog to trigger forms from a commerce engine, you'll need a CMS that can integrate at that level.

9. **What's my budget?**

Got cash but no resources? Go with SaaS providers and leave the heavy lifting and support to them. Got resources but no cash? Go with an open-source solution and save on the soft-ware licensing fee. Got plenty of Microsoft-certified engi-neers? Go with Microsoft SharePoint. Got no cash and no resources? Go with Web 2.0, but favor those free platforms that are interoperable and make it easy to migrate your data.

If you do go the Web 2.0 route, point your account at a web domain you own. That way, you can more easily migrate and redirect the URLs to new ones later. You won't abandon your inbound links and inadvertently sacrifice your search rankings. When Eric moved his Spinfluencer blog from Blogger to WordPress, he didn't want to orphan sev-eral valuable inbound links from Wikipedia. By pointing his Blogger blog to the spinfluencer.com domain he owned, he was able to redirect all his Blogger permalink addresses to the new ones on the WordPress platform. SaaS providers try to be very flexible about embedding their services within your existing web site. However, such options don't exist with Facebook, LinkedIn, or most of the most popular pub-lic social networks.

The Future of the Destination Web Site

The question of who owns what pieces of a web site is becoming more challenging as options proliferate for embedding web 2.0 services. No matter what platform you use, you want one that easily supports the scripts and embeds that enable activity streams from elsewhere to show up on your web site.

You're no doubt familiar with embed codes through the many widgets that have sprouted up in recent years. These are commonly used to display books from Amazon, show off Flickr slideshows, or display the owner's most recent tweets. In the future, these widgets are going to get a lot more sophisticated and a lot better integrated with the sites that display them. A few examples:

- Facebook's Open Graph permits any site owner to integrate the Facebook "Like" button and to enable discussion between Facebook friends without requiring them to leave the site.
- Twitter's @Anywhere platform enables visitors to any web site to interact with a filtered tweet stream in real time. You could use this, for example, to show a live Twitter feed of comments about your industry or product and let visitors participate without leaving your site, or to gather followers on your destination web site.
- Google Wave was a collaboration engine that could be used to embed an activity stream on a destination web site. We thought it had a great deal of promise for B2B marketers. But unfortunately, Google shuttered the service before it had time to become widely adopted, which reinforces the importance of building a destination site on a platform you are not beholden on others to access.

Google open web advocate Chris Messina suggests that in the future activity streams might be used to keep project team members abreast of deadlines and the actions of their colleagues without requiring them to visit a special site. B2B marketers could embed activity streams on topical pages within their own web sites to make it easy for visitors to engage in relevant real-time discussion.

In other words, the web site itself is increasingly becoming an aggregation of services and activities that originate elsewhere. As technology makes it possible for our online scribblings to appear wherever we choose, web site owners will increasingly find themselves acting as curators of external services. For B2B companies, whose relationships with customers are often characterized by rich technical discussion, this ability to become a portal for all kinds of relevant information will unlock new marketing opportunities by allowing markets to self-educate through organic, online sharing and interaction.