

# Week 2: Present Your Social Media Plan

*This week you'll pull your plan together, collecting what you've developed in your prior exercises. You'll use this to define a set of social media-based components that build on your current marketing efforts. Whether starting with a purely listening approach like that of Hallmark or Glaxo Smith Kline, or with an integrated outreach program like the social campaigns of the Brooklyn Museum, this week you'll build your plan.*

*In this final chapter, you'll begin with your business objectives and a definition of your audience. To that you'll add your touchpoint and social feedback cycle, identifying your initial campaign goals. Based on this, you'll make your channel selections and identify the metrics that tie everything back to your business objectives.*

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## Choose Your Path

Setting out to create a plan means picking a suitable approach. You have a few potential paths. For openers, you can imagine the outcome you want and then just start writing. You can look at the work of someone else and do as they did, or you can lock squarely onto your goals and then just put one foot in front of the other until you get there. In this chapter, you'll be doing all three.

Social media as a formal marketing discipline is still relatively new. Perhaps you've been asked — or perhaps you volunteered — to look into social media and see what it's all about. As you work through this final chapter, think about the following points and *imagine* yourself running a marketing program in this context:

- A world without interruptions
- A world where the information needed to make an informed choice is readily available

I opened Chapter 8, “Build a Social Media Campaign,” with the question about what you'd do as a marketer if you could no longer interrupt your audience. What would advertising look like, and how would you take your product or service to market in such a world? A real pushback is happening, and it involves not only interruptive advertising but the sheer amount of digital information to which we are increasingly subjected. This has an effect on the channels open to you, and on the ways in which you can use them. Contemporary playwright Richard Foreman, in an *Atlantic* article about Google and the impact of “search” on the collective intellect, had this to say about the way that the current generation and in fact all of us are *relearning* to think, manage information, and communicate:

*“I see within all of us the replacement of complex inner density with a new kind of self, evolving under the pressure of information overload and the technology of ‘instantly available.’”*

— RICHARD FOREMAN, playwright

Simply put, we (all people) are being subjected to an increasingly intense data stream. Sometimes it is being pushed on us, and other times it's happening because we chose or asked for it. The end result, however, is the same: we are expected to cope with and make sense of increasingly complex global information, with multimedia (a significantly higher density form of information than text, that, a bit like potato chips for your brain, often requires *less* of your active imagination to fully process) and a continuous virtual presence (the always on “Blackberry” thing). *Some* Millennials, along with a number of GenXrs, Boomers, and seniors have mastered multitasking at a personal level and are able to operate in a mode best described as “continuous partial attention.” Like aircraft controllers, AARP's online advocates — solidly in the “senior” segment — are managing incoming and outgoing data, often 24×7. At the same time,

others, again across all demographic groups, are *pushing back entirely*, perhaps using technology for basic communication but little else, with some eschewing technology altogether. The Social Web — precisely because it is a massive connector — promises to elevate this discussion and bring to everyone involved, in some form, a reevaluation of what it means to be receptive to an interruptive message. A world without interruptions may not be that far off.

And so the question comes back: What would you do then? What if you could not interrupt your audience? You need to have an answer for that somewhat hypothetical scenario. At a fundamental level, how you view the role of the interruption and your ability to continue to reach your customers through interruptive media of any form will shape your social media plan.

What about the second of your plan-building options: *taking a cue from others*. Look around and see what else is happening. Extract the best practices and learn from mistakes. In Chapter 2, “The Marketer’s Dilemma,” I talked about Sony and their ill-fated street and blog campaigns. In Chapter 3, “What Is Social Media,” I talked about Sony Tristar’s successful launch of films using online and social channels. In Chapter 7, “Influence and Measurement,” I presented the Sony/BluRay social media data that suggested the probability of a quicker end to the recent DVD format wars — which Sony ultimately won — had the Social Web been tapped sooner. Finally, in Chapter 13, “Objectives, Metrics, and ROI,” I presented Sony’s Backstage 101, a solid use of the Social Web built on Powered’s social media platform. Sony’s work on Backstage 101 has been very well received and resulted in a positive impact to recommendations of the brand as measured by the Net Promoter score. Likewise, the Sony Tristar results — impressive box office revenues generated using primarily digital and social media rather than traditional media — speak for themselves. At the same time, had social media been tapped earlier, Sony could have saved some money in the format wars. The mobile phone street campaign and PSP blog should never have happened at all. Taken together, these five campaigns — all from the same company — are a great example of the value of learning from others, in this case, from a market leader like Sony. Just because someone else did it doesn’t mean you should. At the same time, if you see a best practice, write it down and think about how it might apply to you.

As you develop your plan — and just as importantly as you carry it forward — look around and take notes. When you see smart firms doing things that win praise, consider following. When you see them getting raked over the coals, don’t walk — *run* — in the opposite direction. Recall my opening question for Part III: What will your response be when you see others using the Social Web inappropriately? If you copy their behavior in the hopes that you might get away with it, the Social Web will surely be spoiled for all marketers. Instead, learn and adopt proven, socially accepted best practices. The Social Web may just be your new best friend.

Finally — and to the core of this chapter and in fact the entire Hour a Day process — getting there means getting started, and getting started means taking the first step. Put one foot in front of the other until you reach your goal. You’ve been through 13 chapters and 10 sets of exercises: that’s a lot of steps. Social media as applied to marketing is an evolving discipline, so there is yet a fair amount of leg work that needs to be done. During a panel discussion at Interactive Austin, an enterprise-oriented social media conference, fellow panelist and social media evangelist Giovanni Gallucci talked about the use of Excel as an alternative to the ready-to-use metrics platforms. It’s a bit harder, but it’s also a very good way to *get started*. Look carefully at the needs of your particular application: your way forward and the plan you create will be governed by the resources and constraints that apply in your particular situation. As you work through this chapter, you’ll frequently choose between applying a ready-to-use solution or building one of your own. Perhaps you’ll choose a ready-made platform, or maybe you’ll start by building your own solution — and thereby gain an intimate knowledge of how social media really works. The knowledge you gain can be used later to write a specification for the use of a ready-to-use service that extends your core capabilities as you go for scale. However you proceed, it all starts by taking one step, followed by another.



**Tip:** New to marketing? Are you a sole practitioner, looking to understand social media and develop a practice of your own? You may want to look at this excellent “how to” for building your basic marketing plan, either before or as you take the final steps in building your social media program. This online planning guide, written by marketing expert Shama Hyder, is specifically designed for independent professionals and service firms. You’ll find the guide here: <http://www.afterthe1aunch.com/>

### **Affirm Your Business Objectives**

In Chapter 13, I made the case for starting with your business objectives and then from those objectives developing the basis for your social media campaign. This is an essential step in planning a social media program. Ultimately, what plays out on the Social Web begins in Operations. Unless your program is tied directly to the fundamental goals and objectives of your firm or organization, there is going to be a disconnect between what you are doing and what your customers or constituents are experiencing. That disconnect will hurt you on the Social Web.

Your business objectives form the basis of your social media marketing campaign so this is where you will start. Today’s exercise — as with all exercises this week — will be a matter of pulling together what you have done over the prior months. If you don’t have your business objectives clearly defined — including quantitative success metrics — you’ll want to take the time now to complete this.

## Define Your Audience

Right along with your business objectives, you'll want a clear picture of who interests you the most. Different people do different things on the Social Web, ranging from not participating at all to being the social center from which much content flows in their online communities. This impacts listening just as it does outreach. For example, if you are looking at using a platform like Communispace or Passenger, the current behaviors of your target audience matter. If your audience is used to *participating* and creating content in online communities, this experience will be natural for them. If they've never participated in an online social setting — which may in fact make them the ideal audience for your study — then you'll have to take specific steps to help them up the learning curve. Be sure to account for this when you create your plan: plan *your own involvement* with as much care as you take in choosing your partners.

If you are using social media as an outreach tool, this requirement is compounded. You've seen a dozen channels as you've worked through this book — blogs, podcasts, photo-sharing sites and more. Each of these dozen channels has as many more options in terms of service or platform providers. Knowing what your audience is doing and using — or is likely to participate in — is critical to your success.

## Choose Your Examples

In the previous 13 chapters, you saw in excess of 20 case studies and featured uses of social media. Additional references were presented in various sections as social media examples of what works on the Social Web and what doesn't. Which ones stand out? Which ones “feel” like the kind of approach to social media-based marketing that would work for *you* and would fit into or alongside the programs you have in place now? Citing established examples can help you identify best practices as well as avoid missteps; beyond that, as a part of your presentation, solid results that you can point to will help your colleagues who may be silently looking for some reassurance. After all, even though *you've* concluded that social media is a worthwhile addition to your marketing program, unless you're a sole proprietor you've still got to win support from everyone else involved.

**Tip:** Jeremiah Owyang, a Senior Analyst for social computing with Forrester Research, has compiled and now maintains a list of established brands that have adopted *and published* their social media strategies. This is a superb resource for you especially as you finalize the core elements of your social media plan and prepare to present it to your colleagues. You will find Jeremiah's list here:

<http://www.web-strategist.com/blog/category/industry-index/>



## Monday: Build Your Foundation

Today you're going to spend an hour setting up your plan and framing your presentation. You'll be reaching back to the work you've already done, and thinking through the approach that you want to take in developing and presenting your campaign.

To develop your actual presentation or project proposal, use whatever tools you are most comfortable with: a document, a slide presentation, or a project-planning tool. Any of these will work well, but a quick note is in order:

*“Power corrupts. PowerPoint corrupts absolutely.”*

— EDWARD TUFTE, professor emeritus of political science, computer science and statistics, and graphic design at Yale.

That's enough said about that. For more on the *effective* use of slide software in creating presentations, go here:

<http://www.edwardtufte.com/tufte/powerpoint>



**Tip:** A set of worksheets covering this week's exercises can be found in the appendix of this book. In addition to these printed worksheets, you can also download electronic copies and access related resources at the website accompanying this book. Complete information regarding these resources and the website is included in the appendix.

### Monday's One-Hour Exercise

Over the next hour, create the opening section of your presentation and project proposal.

1. Start with your business objectives. Clearly identify each, and include the success metrics associated with specific business objectives.
2. For each objective, identify the current marketing effort(s) associated with it, and provide a brief statement as to where you are now and how you are measuring this.
3. Define your audience(s) and provide a brief overview of the ways in which they are using social channels. Include any trend data that shows how they might be using this in the future.
4. Offer examples of best practices and things to avoid: because you haven't identified specific channels at this point of your presentation, focus on examples that show transparency, participation, or listening versus outreach. The objective is to give your audience a sense of what you are about to propose and why applying social media *correctly* is so important.
5. Finish this part of your plan and presentation with a statement as to how you will fundamentally approach the Social Web. Are you proposing a listening effort aimed at understanding why certain conversations about your brand are taking place, or are you proposing the use of one or more specific outreach campaigns to accomplish an identified growth objective?

## Monday's Wrap-Up

Today you framed your plan. If this were the presentation itself, those in attendance would understand just how *your business objectives* are driving your proposal for the incorporation of social media into your marketing program. Even though they have seen a couple of examples of social media and related best practices, they may or *may not* understand what social media is yet. At this point in your presentation, you are putting your foundation in place: that foundation is your business-based rationale for properly adding this thing called social media to the marketing mix.

**Tip:** Open your plan discussion or presentation with what your audience already knows: the business in which you all have a shared future. If instead you *begin* with a discussion of social media, your audience is likely to jump to MySpace or whatever their personal preconception of “social media” happens to be. You’ll spend the next hour trying (and quite possibly failing) to overcome that. Start with your business objectives.



## Define the Opportunity

How you set up your plan is as important as the information you present. The right idea — presented the wrong way — is unlikely to be approved. A case in point was the presentation to Congress and request for funding of the Voyager deep space program, a program which I joined later at Jet Propulsion Labs. The original plan, known as The Grand Tour, called for Voyagers I and II to visit Jupiter, Saturn, Uranus, Neptune, and Pluto. (At the time, Pluto was a planet. It isn’t any more.) *The Grand Tour was considered too ambitious and was scrapped.* In its place, a scaled-back Voyager program — calling instead for two planetary visits, Jupiter and then Saturn, shown with one of the Voyagers in Figure 14.1 was offered. *This more modest plan was approved.*

**Tip: Take-away number one:** When your audience perceives risk, they generally act in concert to reduce it or eliminate it, sometimes along with you and your plan.

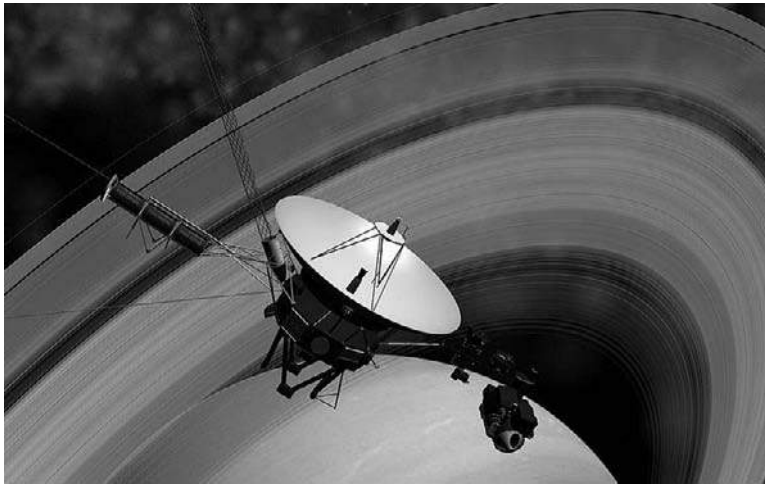


Of course, I wouldn’t be telling this story if that’s all there was to it: we’ve all been shot down in presentations, and we’ve all come back to fight another day. In this case, the scaled-back Voyager program not only went forward, it *succeeded in accomplishing the Grand Tour objectives*: after visiting Jupiter and Saturn, Voyager II continued on to Uranus and then Neptune, with a visit to Saturn’s moon Titan taking the place of the Pluto fly-by. The program, which ultimately included the successful visit of all four of the outer planets, was launched, as it were, into the history books.



**Tip: Take away number two:** Get *something* approved and you've preserved your chance to go big later.

What does this have to do with you? Avoid the appearance of too much, too fast. Instead, *under*-promise. The key is to make people comfortable with the ideas you are presenting and to help them see (and share in) the notion of success. Social media is disruptive. Be sensitive to that, and provide a solid footing that minimizes risks and the potential for failure. Make it easy for the decision makers in your organization to support you. Then over-deliver.



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**Figure 14.1** The Voyager Space Probe Passing Saturn

With the foundation of your marketing plan in place, the next step is to set up *why* you are proposing what you are about to propose. As I noted in prior chapters, “Because everyone is doing it...” or “Because it’s the newest thing or the wave of the future” is not going to cut it.

Lots of people — me included — have made this mistake. At a recent conference on enterprise software, a number of social media platform and service vendors offered as strategies for gaining internal support amongst enterprise decision makers things like “Just give us \$50K and we’ll show you what it can do” or “Think of this as an experiment — try it and see what happens.” They have a valid point: there aren’t a lot of case studies yet, and somebody does have to be first. But at the same time, C-level decision makers typically require a bit more meat before biting.

I am as much a proponent of taking risks as anyone — I worked on the space program, remember? I also have a real bias toward rational motivations and measured progress. (Again, I worked on the space program.) Yes, social media is new, and there



is definitely a reason to experiment and figure out how it applies to *your* business. At the same time, your risk-averse colleagues — your CFO and CTO, who have issues such as security, technical support and Sarbanes-Oxley to keep them up at night — may not be in love with the idea of seeing the brand plastered across MySpace, one click away from something scary or inappropriate. Which, by the way, is why I said to start with the business objectives.

Although MySpace is often the setting of the cliché example of inappropriate ad placement, it isn't actually all that scary, especially as viewed by its members who spend time there. Beyond that, social media-based marketing, rationally implemented, *offers very little chance* that your brand will end up in the wrong place, any more than your magazine ad will. But do you really want to begin your presentation with a defense of MySpace? By starting with your business objectives you *avoid raising that issue* until you've grounded your audience in what social media is really all about. By starting with your business objectives when you make your case for using social media, you've put yourself on solid ground.

Starting with the business fundamentals gives everyone a way to get on board and to establish a basic agreement with what you are presenting. Build on that by showing *how what you are doing now*, through your current marketing efforts, is delivering results. You'll also want to be very specific — as specific as possible — as to how adding social media to the mix can bring *additional benefits*. No one is going to argue with the core business objectives, and if you can show how you will improve the effectiveness of whatever is happening now, you'll have gotten yourself a good way through the presentation without being shot down. I've certainly experienced worse.

Ultimately, if you push too hard too soon, your colleagues and decision makers may love what you're saying, but then suggest a “wait and see” strategy. If that happens, it's likely game over. A better approach is to have a plan for the “big success” that you really believe in. Then break it into smaller pieces, and make each component of your plan accessible to your colleagues and decision makers. Help them help you.

**Tip:** Use normal language, the kind you'd use when explaining what you do all day when a relative or friend *outside* the industry calls and asks. Every discipline has a technical language of its own: it makes communication more precise and more efficient. At the same time, we all share some form of common language, the words and phrases we use when communicating in situations where the audience is more general. Stick to *that* language.



## Social Feedback Cycle

Recall Chapter 5, “The Social Feedback Cycle.” By overlaying your purchase funnel onto the Social Web, it's clear that social media is a product of an experience *and* it has an impact on your sales cycle. In Chapter 5, I noted the following quote, from a Forrester Research study:

*“No matter what I hear, read, or find on TV, radio, or in a magazine or newspaper, I can verify it on the Internet.”*

This is the social feedback cycle, and it is exactly why the Social Web is so important to your business. As a marketer, you are tasked with telling customers and potential customers what they should expect, why they should buy from you, and what sort of value will be gained. At the same time, they are increasingly turning to others — and especially others with direct experience with your product, service or brand, and asking “Did this work for you?” If so, you’re in good shape. If not, then you’ve got an opportunity.

The social feedback cycle shows the value of listening. Following a purchase, there is a continuous stream of conversation on the Social Web, and an increasing share of this is making its way — as social media — back into the purchase funnel. You can listen to the stream of conversations using tools such as Blog Pulse, Cymfony, Techrigy, Google Alerts, or using a tool that you have created.

Because the social feedback cycle is a loop, you can start at any point. You can begin by listening, and then use what you learn to drive product improvement and in doing so influence the next round of conversation. Or, you can start closer to home by implementing ratings and reviews using the Bazaarvoice platform, for example, applying this social media channel to drive additional sales. Wherever you choose to start, ultimately you’ll want to measure and characterize the entire social feedback cycle as it applies to your specific objectives and application.



**Tip:** If you are running a commerce site, and looking for a low-risk entry into social media, think about using the Bazaarvoice platform. Fifty of the top 100 online retailers are Bazaarvoice clients: this is one of relatively few ready-to-use social media applications where you can directly point to top companies *using social media in business* and thereby substantially reduce the level of perceived risk when presenting your plan.

### Touchpoint Map

It’s time to pull out the touchpoint map you developed in Chapter 6, “Touchpoint Analysis.” Your touchpoint map links what you are doing now with the experiences about which your customers are — or could be — talking. Your touchpoint map — on which you ranked touchpoint performance against talk value — tells you the following:

- What touchpoints are contributing to the conversations taking place in reference to your product, service, or brand?
- Which of these, based on touchpoint performance, are likely to generate favorable, neutral, or unfavorable conversations?
- Compared with all of your touchpoints, which are your outliers and/or most likely candidates for improvement?

Taken together, your touchpoint map provides you with a starting point in terms of knowing where to focus your efforts — what to improve, what to avoid messing up — and where your important talk-generators are. Knowing what to improve is obviously important: because your customers are free to talk about you, you want them to have the best experience possible before doing so. It's likely that you are focusing on this sort of thing now.

Less likely and, therefore, one of the items you'll want to emphasize in your plan and presentation is the importance of understanding your specific talk-generators. Using tools such as Techrigy's platform, Cymfony, BlogPulse, or Google's Blogsearch to locate and define your talk-generators is key to identifying the social media channels that you'll want to use.

**Tip:** Your touchpoint map provides another very easy entry point into social media. If you have a touchpoint that is generating negative conversations, you can use it as a trial case within your organization. Team up with Operations and fix it. At the same time, use the suggested monitoring tools to track your progress. By showing that you can influence conversations — *the right way* — you can reduce the fear that social conversations are somehow completely beyond reach. Remember, you can't control these conversations, but you can influence them.



## Net Promoter Score

In Chapter 7, I introduced the Net Promoter score. Again, the exercise you did — calling and surveying a relatively small number of customers — was designed *to show you how this tool works*. It may or may not be a statistically valid exercise. If it is — if your business has a relatively small number of customers or you've since called more — then you can infer quite a lot from the exercise. If your business has a large number of customers 100 or 1,000 times the 10 or so you called in this exercise, then you'll want to follow the Net Promoter methodology and obtain a statistically valid measurement. The good news is that you can start doing this immediately and establish a great social tracking tool in the process.

## Tuesday: Choose Your Methods

Today you're going to spend an hour building the portion of your plan along with the presentation that articulates the drivers of what you will be doing and what will happen as a result. In other words, where yesterday was about establishing a foundation for your social media plan in your business objectives, today is about characterizing and defining the opportunity that exists, and your argument for why a social media-based effort is part of the solution.

### Tuesday's One-Hour Exercise

Over the next hour:

- Based on your Net Promoter score — noting that this may simply be a directional guide — decide how this information will fit into your plan. If your Net Promoter score is reasonable, say 40 percent or higher, and your sample is significant, then you may choose to cite this as assurance that an outreach program carries only minimal risk. If it's negative, you may choose to use this as the basis for a listening program and a closer partnership with Operations.
- Based on your touchpoint map, identify the three most important talk generators. Note specifically the things you are doing now to capitalize on positive talk. Note the internal (Operations) efforts that are associated with any important talk generators that are negative.
- Develop a set of issue to explore with Operations based on any negative points that you know exist now. (Don't worry that you cannot resolve anything right now: you don't have the data for this yet. Part of your plan involves getting it.)
- Pull from your social feedback cycle the starting point for your campaign: are you proposing a listening effort that starts on the Social Web, an outreach effort that begins with your own content, or some combination of the two?
- Again referring to your social feedback cycle, decide whether or not your campaigns will involve your current conversion process. Are you looking to quantify what is being said and to then use that as a way to improve and thereby positively influence the conversations, or are you looking to directly impact conversion rates?

### Tuesday's Wrap-Up

You now have the basis for your plan in hand. You've defined the central opportunity that you are pursuing, and you've fundamentally tied it to your business objectives. To begin influencing social conversations, you've identified areas where Marketing and Operations can work together to and improve the customer experience that drives these conversations.

### Select Your Channels

On to the fun stuff! In this next section, you're going to pick channels and develop the objectives for the specific campaigns built around them. This section draws heavily from "Part III: Social Media Channels." In this section, you'll be referencing the objectives and choices you've made and built into your plan over the two preceding days.

The channels you choose for your campaign will of course depend on the campaigns themselves, so start there. The social feedback cycle is a loop, so the starting

point is a bit arbitrary. What you hear should ultimately impact what you do, and what you do will likewise impact what you hear. So, instead of looking for the starting point to a circle, turn instead to the fundamental objectives of your campaign that you identified yesterday. Of these, there are two primary activities: listening and outreach. Pick one. You can use either as a starting point, and then based on your plan show how what you're proposing drives the entire feedback loop.

## Listening

Listening is the single most valuable activity that you can engage in on the Social Web. As such, it's a great place to start your social media program. The Social Web is a place where you can learn about how every aspect of what you do is perceived, and then use that to improve.

When you consider that a leading frustration that consumers express involves (not) being listened to, it's a pretty safe bet that adding this capability to your marketing program will be well received. Just be sure that you are equally ready to act. Bill Fields, former CEO of Wal-Mart Stores Division, Hudson's Bay Company, and Blockbuster Entertainment Group (yes, all three), noted during our panel discussion at the 2008 Interactive Austin conference on enterprise social media that, "The biggest mistake a marketer can make in terms of listening is *not acting* on what your customer tells you." That is solid guidance.

In the following sections, the social media channels associated with listening are described, along with typical examples and suggested applications. Table 14.1 provides a summary reference.

► **Table 14.1** Social Media Listening Channels

Channel Group	Channel	How Applied	Representative Tools	Examples
Social Platforms	White Label Platforms Service Provider Platforms	Support Forum Research Group	Pluck, Jive Software, Lithium Communispace, Passenger	Lithium Seagate Support Hallmark, GSK, FOX, Chrysler
Social Content	Blogs	Gather feedback, ideas, suggestions	Wordpress, Blogger, Typepad, Pluck, Jive Software, BlogPulse, Cymfony, Techrigy, Google Alerts, Salesforce.com	MyStarbucksIdea, Dell's IdeaStorm
Social Interactions	Email and RSS Feeds	Gather competitive and market intelligence	Email, Google Reader	Competitive and Industry Group Newsletters and Product Bulletins

## Social Platforms

Social platforms — whether through a presence on a public social network or the creation of your own branded community — offer perfect opportunities to listen. Support forums and efforts such as Starbucks’ “My Starbucks Idea,” presented as a featured case in Chapter 6, or Dell’s “IdeaStorm” are examples of this type of listening application. I referenced Communispace and the listening platforms developed for Hallmark (Chapter 3) and GSK (Chapter 5). Each of these provides quantifiable information that you can use to your competitive advantage.



**Tip:** You’ll find “My Starbucks Idea” here: <http://www.mystarbucksidea.com>  
You’ll find “Dell’s Ideastorm” here: <http://www.dellideastorm.com>

## Social Content

Whether through blogs, multimedia content, or ratings, reviews, and recommendations, people are creating and sharing a lot of information. A good chunk of that relates to products, services, and brands.

Ratings, reviews and recommendations implemented on your platform or through a service partner are an immediate source of feedback. You can track your own feedback, and you can track your competitors. You can track your suppliers and customers as well. If this seems like overdoing it a bit, go back to your touchpoint map: It’s not uncommon that your performance — from the perspective of your customer — is itself *determined* by a partner or supplier, or viewed by your customers in the context of a competitive experience. The more information the better, at least at the outset of your program and until such time as you determine that one or more specific measures aren’t adding to your understanding of your market presence and perception.

With regard to blogs, tools like BlogPulse and Cymfony can provide visibility into online and offline conversations that impact your brand. Dashboard products like Tegrify include blog content monitoring as well. You can use Google Alerts and Blogsearch and then import the data into K.D. Paine and Partner’s DIYDashboard or your own tracking system. Aren’t choices wonderful?



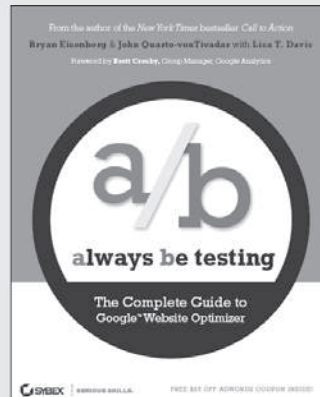
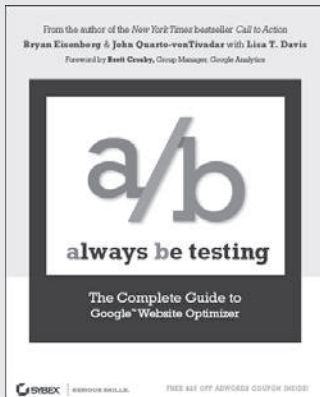
**Tip:** Metrics is the next expansion area in the business use of social media. Pay special attention here, and consider setting up a Google Alert for the topic of “social media metrics” and the products of the service providers I’ve referenced.

## Social Interactions

If you want to know what your competitors are up to, sign up for their news feeds and email newsletters. Track them over time to keep tabs on the market as they see it. A lot of this comes under the heading of good old-fashioned competitive intelligence. Because your competitors are a part of the overall marketplace, they are contributing to the context in which your products and services are evaluated. Competitive activities most definitely impact touchpoint results and, therefore, drive Social Web conversations.

### Always Be Testing

Author and online marketing expert Bryan Eisenberg released his latest book, *Always Be Testing*, with two covers. Why? He didn't know which one his readers would like the best. As the book begins to sell, Bryan will "listen" to his audience by watching the sales to see if one cover outsells the other. If so, expect to see a market develop on eBay for the discontinued ("collectors item") version. Better yet, buy both and have Bryan sign them. One of them is sure to be worth a fortune in the future.



## Outreach

If you opt to create content or offer an environment in which social content can be created, then outreach programs using social media and the Social Web should be a part of your plan. By tapping social media for outreach, you can extend your brand and position it closer to the focal point of the conversations through participation in existing communities, or by creating a social community of your own. In the following sections, the social media channels associated with outreach are described, along with typical examples and suggested applications. Table 14.2 provides a summary reference.

► **Table 14.2** Social Media Outreach Channels

Channel Group	Channel	How Applied	Representative Tools	Examples
Social Platforms	Social Networks	Presence	Facebook, LinkedIn, MySpace,	BMW, Product Pulse
	White Label Networks	Product Extension	Ning, Pluck, Jive, Broadband Mechanics	Ad Gabbr, Meredith Publishing, Condé Nast, Rodale
	Wiki	Collaborative Development	Jive Software, WetPaint, Twiki	Wikipedia, WOOD Magazine, FG SQUARED
Social Content	Photo Sharing Video Sharing	Common Interest, Product and service uses	Flickr, YouTube, Kyte, Photobucket	The Brooklyn Museum, General Motors (Volt)
	Podcasting	Information and Learning, Entertainment	Odeo, HearThis.com	Beachwalks with Rox, Personal Life Media, ProstateNet.org
	Blogs and Microblogs	Corporate Blog	Blogger, Typepad, Wordpress, Twitter, Plurk, Seismic	Dell (@DellSmBizOffers) Zappos, Southwest Airlines, Mars Lander
Social Interactions	Event Services	Event Organization	Eventful	The Brooklyn Museum
	Location Services	Meetups	Dodgeball, Brightkite	Starbucks, Chili's Grill and Bar
	Update Aggregation	Pushing content streams	FriendFeed, Facebook, Minggl	The Roxy Theater

**Social Platforms**

Social platforms provide multiple ways to properly extend your brand onto the Social Web. Where permitted, create a presence in public social networks and use that presence to provide a bonding point with customers and potential customers. Alternatively, create a community around your existing content: Meredith, publishers of *Better Homes and Gardens* along with *Parents* magazine, has successfully done this as have Condé Nast and Rodale. *USA Today*, building on Pluck's Sitalife platform, has integrated its readership community through commentary on current events and then reflected that back by placing these reader-generated comments prominently on the homepage of the newspaper's online site. The newspaper includes a completely personalized community experience — powered through a member persona like that shown in Figure 14.2 — to further the notion of community and belonging, driving stickiness, use, and loyalty of the online newspaper.





Figure 14.2 My USA Today Member Profile

Wikis and similar collaborative tools — Jive Software’s Clearspace platform, for example, can be used to create places where customers, partners, and suppliers can work together and develop what Guy Kawasaki calls “curve jumping” solutions, built on the radically different ideas that occur when thinking is moved outside of existing constraints. Google and Reddit both offer best-of-class communities that support their respective developers and members: Through this kind of community and participation, applications that may not have been conceived of — much less developed — within the organizations themselves are brought into the market. Good ideas can come from anywhere.

## Social Content

Using social media as an outreach component of your program means either making your own content, as Home Depot did with its YouTube-based “Basics of Paint,” or alternatively, providing your customers with the direct ability to create their own content, as Home Depot did with its “\$25K Remodeling Contest.” Look as well at Seismic, shown in Figure 14.3, and in particular the “askseismic” support series that uses the company’s own platform to create a video conversation between employees and customers seeking help or asking questions. Blogging, photo and video sharing, and podcasts can all be used effectively as *direct outreach tools* — meaning, you make or oversee production of content intended to be shared — or as tools that your customers are invited to use to create and share their own content.

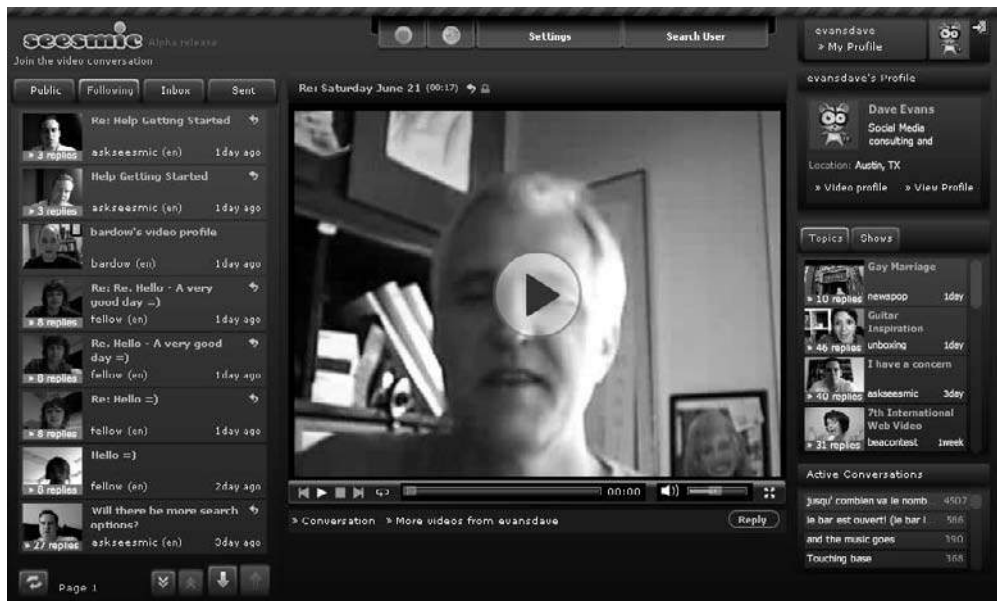


Figure 14.3 Seesmic — Dave Evans on Social Media

### Social Interactions

Services like eBay veterans Brian Dear and John Glazier’s Eventful can be a natural social extension of your business. If you offer events, host conferences, or have a product or service that people like to do in groups — cooking, sports, or travel, for example — Eventful’s customer-driven event services help make *them* it happen. How’s that for delegation?

Location-based services like Brightkite and Dodgeball can be used in combination by facilitating *meetups*, casual get-togethers typically arranged on the fly, and similar gatherings. For your part, to get the most out of these services, you need only make sure that you are listed. If your business is centered around a social location — for example, a café or theater — encourage your customers to use these services to bring their friends and associates to you using the “warchalking” symbols I suggested in Chapter 12, “Social Interactions.”

### Wednesday: Pick Your Channels

Today you’re going to select the channels that will form the core of your social media program. You have your businesses objectives and audience defined, and you’ve worked out your approach — listening, outreach, or a mix of both. You’ve sorted out where you want to focus: on the Social Web itself, at the point where the conversations are being picked up by your potential customers, or as a part of your current commerce or conversion pipeline.

### Wednesday's One-Hour Exercise

For the next hour:

- Based on your selected approach, from Tables 14.1 and 14.2 select the two or three channels you'd like to use.
- Using Google, research each and find competing services: they change continuously, so do this regularly.
- After validation, decide on the actual channels you'd like to add to your plan.
- For each selected channel, write out the main idea you have for the use of this channel and add it to your plan.
- For each selected channel, develop or secure an estimate of the cost any an associated timeline for deployment.

**Tip:** For some plan elements, you may not be able to obtain an exact cost at this point. That's fine. You may not be able to get a final signoff on your plan at this point. Understand that ahead of time, and go instead for the biggest "yes" you *can* get right now. For example, gain consensus on developing a formal specification and an RFP based on your plan and ideas. Remember, one foot in front of the other.



### Wednesday's Wrap-Up

Today you added your first social media channels to your social media plan. It's limited to two or three by design: there is always more that you can do, and there will be more choices next month than there were last month. Having added a small number now you can always expand later. Tying your choices for your initial methods into your business objectives makes your work in selecting channels and partners that are likely to work for you that much easier, and makes approval that much more likely.

At this point your plan and presentation should have the following elements: check now to see that it does.

#### Plan Foundation (Monday)

- Statement of business objectives
- Marketing programs supporting each objective
- Current status and applicable success measure for each
- Audience behaviors with regard to online and social media
- Applicable best practices and examples of each
- Choice of approach: listening, outreach, or both

**Statement of Opportunity (Tuesday)**

- Net Promoter score and interpretation
- Touchpoint analysis and key findings
- Opportunities for collaboration with Operations
- Social feedback cycle and campaign points

**Selected Channels (Wednesday)**

- Specific channels you plan to use
- Preferred provider or method for each

If your plan does not contain each of the above, go back to the section of this chapter that applies to the missing or incomplete sections.

**Select Your Metrics**

With your channels and social media selections set, the remaining step in developing your plan is identifying an appropriate set of baseline and ongoing metrics so that you can track your progress. The point of the metrics you select is twofold:

- First, you want to know if you are moving toward your goal, and if you are improving your present market position or condition.
- Second, as your social media efforts get underway, some of your channels will perform better than others. You'll want to be able to capture this, and respond appropriately. Metrics are your guide.

New solution providers and social media options will emerge. By setting baseline metrics and then tracking the performance of various campaign elements, you'll know which are working and which need tuning or outright replacement.

Referring to Chapter 13, you will tie your business objectives to the metrics that you covered. I have split the fundamental business objectives into three groups: market position, brand health, and growth and profits. Most business objectives fall under one or more of these headings. In the event that your specific objectives do *not* fall neatly into one of these, look at the groupings and then find the closest group or groups and work from there. The objective is not to put your objectives into a bucket but rather to look at the types of metrics that are available and then to see what the best way to tie these back to your objectives might be. The groupings are merely a convenience, a starting point.

**Market Position**

If your business objectives include things like “establishing a leadership position” or “opening three new markets” or something similar, then measures of conversations along with the Net Promoter score can be very helpful in tying a social media-based marketing effort to your underlying business plan. In this case, you are using two

measures: the overall conversational levels about your competitive set and the conversational levels of your specific brand, product, or service expressed as a fraction of the total conversation, and the polarity of the conversations you find.

Figure 14.4 shows the relationship between market position and the available measures of social media conversations. Table 14.3 lists each of the audience measures that are readily available along with the source of that measure. As with all social media measures, the recommended technique is to track the measure over time, and then interpret the change as you operate different portions of your social media campaign.

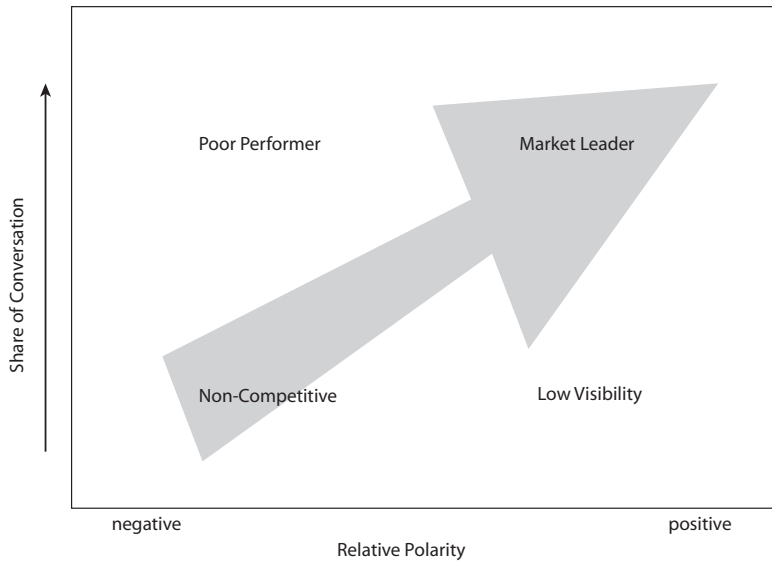


Figure 14.4 Market Position and Audience Metrics

► Table 14.3 Market Fundamentals and Metrics with Suggested Sources

Fundamental	Metric	Source	Ties To
Audience	Blog Posts for Brand, Competition, Product or Service. Recommendations, Tweets and similar. Widget views	BlogPulse, Google Alerts, Cymfony, Techrify, Blog-search, Technorati, Net Promoter score, Social Media Platform dashboard	Relative measure of interest and awareness in your brand, product, or service.

### Brand Health

Your business objectives may include aspects of *brand health*, the relative value of the equity associated with your brand. Nike and Google have relatively high brand values,

for example. Table 14.4 lists representative measures that are commonly available. Each of these is a surrogate for brand health. Note that bounce rate is inversely related: a high bounce rate is generally *not* good. It means people arrive but don't look into your offer in any sort of depth. Again, it is not an absolute value that you are looking for here, but rather a change (and direction of change) over time.



**Tip:** When looking at the Comment-to-Post ratio, more comments per post are generally better. Obviously, Post-to-Comment ratio — an equivalent measure sometimes cited — expresses the same thing but in an opposite way.

► **Table 14.4** Brand Fundamentals and Metrics with Suggested Sources

Fundamental	Metric	Source	Ties To
Influence	Time on Site, Bounce Rate	Web Analytics: Google Analytics, Omniture, Web Trends	The value of your brand in generating interest.
Engagement	Pass Alongs, Comment to Post Ratio, Diggs, Stumbles and bookmarks, Podcast listens and views.	Web Analytics, Google Analytics, Omniture, Web Trends, DoubleClick, Digg.com, StumbleUpon.com, Del.icio.us, Feedburner	The value of your brand in maintaining and spreading interest.
Loyalty	Blog posts for your brand, Recommendations, Tweets and similar	BlogPulse, Google Alerts, Cymfony, Techrigy, Blog-search, Technorati	The value of your brand in retaining current customers and building long term relationships.

### Growth and Profits

If you are concerned about sales and profits, you're not alone. It's hard to imagine a business plan and a set of objectives that don't directly or indirectly include some performance measure related to cash coming in the door along with a companion measure of how much of it actually sticks around.

Social media metrics — implemented near or very near your conversion pipeline — provide measures that both indicate a likely trend in sales, and tie activity on the Social Web directly into the sales pipeline.



**Tip:** Tying social media into the sales *pipeline* is not the same as tying social media into a specific sale. Tying to the sales pipeline provides a measure of influence. Tying to sales — very few and quite specific cases aside — isn't generally possible, any more than tying one car purchase to a specific TV spot is generally possible.

By tying activity on the Social Web into the sales pipeline, you can track the relative increase or decrease in conversion rates as you measure and observe various conditions on the Social Web. Understand that this is directly analogous to measuring the effectiveness of a TV spot or any other form of media — with the possible exception of some forms of direct response marketing — in that it assumes that the change observed is due to the change induced in the system. If you are changing seven things at once, then the changes in measures you observe are due to the combined impact of all seven changes you made. This implies the need to establish a baseline — as I noted in Chapter 13 — *before* you implement your social media campaigns.

This isn't as onerous as it sounds, but it does require some thought. For example, you probably already have a very good idea of how the changes in your marketing budget directed to the advertising you are doing now impacts sales. If so, and if you are careful about how you introduce your social campaigns — measuring each as you release it — then you can use your current knowledge as a baseline on which to build a quantitative assessment of the value of social media.

**Tip:** The Social Web is active and is currently impacting your marketing efforts. *This is part of your current baseline.* By beginning with listening, you can establish the current state of the conversations on the Social Web and thereby factor these into your initial baseline assumptions *before* you introduce any outreach programs that attempt to change those conversations.



Table 14.5 provides a listing of representative sales and profits related measures, along with the sources of each.

► **Table 14.5** Sales Fundamentals and Metrics with Suggested Sources

Fundamental	Metric	Source	Ties To
Audience	Referrers, Demographics	Web Analytics, Google Analytics, Omniture, Web Trends, DoubleClick	Uptake measures in key segments
Influence Loyalty	Time on Site Bounce rate	Web Analytics, Google Analytics, Omniture, Web Trends Repeat Customers	How likely customers are to buy from you; the degree to which you need to incentivize your sales
Action	Conversions Reviews Recommendations Tweets and similar	Web Analytics, Google Analytics, Omniture, Web Trends Review Platform Net Promoter	The number or dollar value of sales made

## Thursday: Verify Your Metrics

Today you're going to spend an hour picking the metrics you need and adding them to your plan. For each, you'll start with your business objectives and then find an appropriate measure. Once you've identified them, you'll verify the source and availability of that data and add it to your metrics spreadsheet.

### Thursday's One-Hour Exercise

During the next hour:

- For each of your stated business objectives, identify the social media metrics that are associated with this objective and the current success measures associated with this business objective.
- For each metric, identify the source and verify its availability.
- Create a place for this metric in your metrics spreadsheet.

### Thursday's Wrap-Up

You've now completed the final step in building your social media plan and your presentation. Tomorrow you get to finish it up, and then you can review and present it. At this point, your plan and presentation should have the following elements: check now to see that it does.

#### Plan Foundation (Monday)

- Statement of business objectives
- Marketing programs supporting each objective
- Current status and applicable success measure for each
- Audience behaviors with regard to online and social media
- Applicable best practices and examples of each
- Choice of approach: listening, outreach, or both

#### Statement of Opportunity (Tuesday)

- Net Promoter score and interpretation
- Touchpoint analysis and key findings
- Opportunities for collaboration with Operations
- Social feedback cycle and campaign points

#### Selected Channels (Wednesday)

- Specific channels you plan to use
- Preferred provider or method for each



### Metrics (Thursday)

- For each business objective for which you have identified a social media based marketing effort, an applicable metric and its source

If your plan does not contain each of the above, go back to the section of this chapter that applies to the missing or incomplete sections.

## Write and Present Your Plan

Your social media plan is essentially written. If you are building a slide presentation or written proposal, the primary sections should correspond to each of the exercises you've done this week. Of course, you can choose any organizational approach you'd like, but again, I recommend starting with business objectives and avoiding a head-long leap into social media.

### Friday: Wrap It Up

Today you're going to spend an hour organizing, filling in gaps, and then assembling your plan and plan presentation.

#### Friday's One-Hour Exercise

During the next hour:

- Check each of the primary sections of your plan.
- Verify the facts, sources of data, and similar details.
- Set a future meeting time and then present your plan.

**Tip:** Based on your plan, establish clearly in your mind the decision you will ask for in this opening presentation: it may be the outright approval and funding for your entire plan, or it may be a "go ahead" to the next step of writing a formal RFP. Understanding what you are requesting and ensuring that you are requesting something that your audience is able to give an approval for is a key presentation skill. Don't overlook this.



### Friday's Wrap-Up

You are now ready to present your plan. Not only have you based it on your business objectives and tied in key constituents (e.g., Operations) but by following the Hour a Day process over the past three months, you have prepared yourself for any questions that are likely to come up. You have put yourself in a position not only to succeed personally, but to carry that success to your team and colleagues, and ultimately to your firm and its beneficiaries, including your customers.

## Chapter 14: The Main Points

- Social media-based marketing begins with business objectives and an understanding of your audience.
- Social media as applied to marketing is fundamentally measurable in ways that can be tied to your business objectives.
- Understanding what you will be asking for and identifying the biggest “yes” you can get at each approval step is critical to selling in your social media plan.