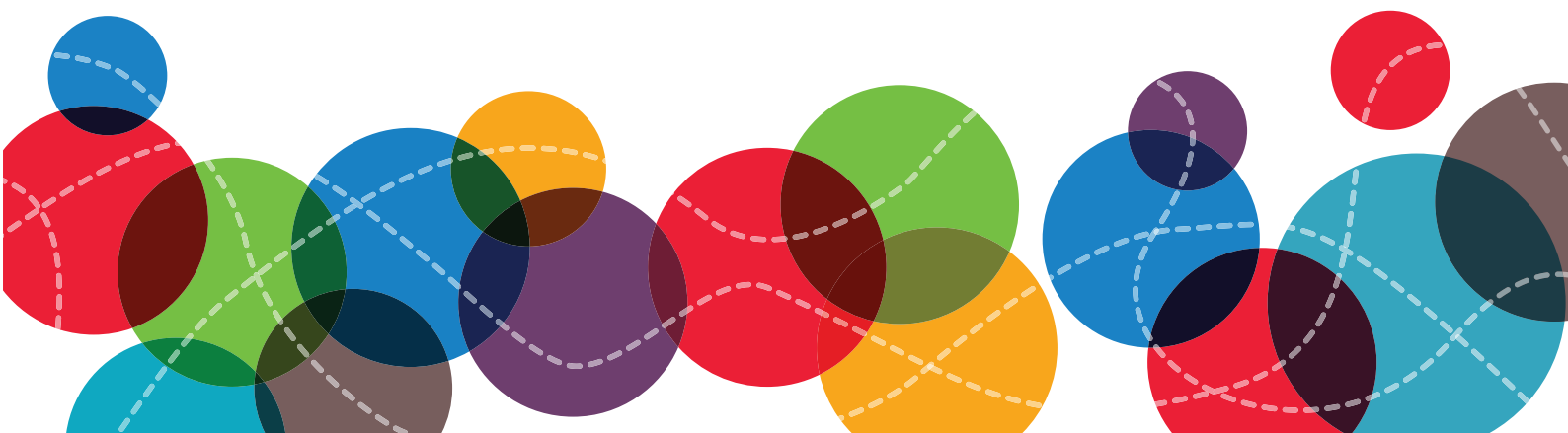# Smart Insights

Social media marketing strategy

Workbook and template checklists

Dan Bosomworth and Dave Chaffey

Published: August 2011

Plan > Reach > Act > Convert > Engage

Social media marketing strategy

Workbook and template checklists

Set business goals

Create strategy

Social listening and reputation monitoring

Content and engagement strategy

E-communications strategy

Practical advice for core platforms

Social media optimisation

About this workbook

Social media marketing is so new that most are still trying to work out the best approach for their company. This workbook and the checklists will help you create a strategy and review the practical actions to make best use of social media marketing.

Why use this workbook?

☑ Create a strategy to prioritise your social media marketing activities to support business aims

☑ Define measures and KPIs to help manage your digital marketing

☑ Review the best tools to analyse and manage your social media marketing

Topics covered on this checklist?

This workbook covers these topics:

☑ Using social media marketing to impact across business activities - there's more to it than Facebook!

☑ Setting goals for social media marketing

☑ The best tools to use for social media marketing

How and when to use this checklist?

☑ When developing a new social media strategy

☑ Reviewing existing social media activity to take your "social media to the next level" using Social media optimisation

Related advice from Smart Insights:

☑ 7 Step Guide to Social Media Marketing Strategy (Ebook and online training course) - this document acts a summary for these documents which give more detailed advice

☑ Video screencast to finding influencers

☑ Video screencast on tracking social media through Google Analytics

Tell-us-what you think!

Dave Chaffey and team have developed these checklists based on working with many types of companies and in training. But improvements are always possible, so please email: support@smartinsights.com with your ideas on improving this guide or new guides to help your work. Thanks!

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Introduction
Setting the scope of social media marketing

Social media marketing is still quite new, so it means different things to different people in your company and amongst your suppliers. So we suggest you start by scoping what's involved for company.

We think the CIPR Social media panel scopes out social media well[1]:

Social media is the term commonly given to Internet and mobile-based channels and tools that allow users to interact with each other and share opinions and content. As the name implies, social media involves the building of communities or networks and encouraging participation and engagement.

Their definition shows that the most important feature of these social media channels is that we encourage our prospects and customers to interact and create user generated content (UGC). Social media can be used as another broadcast-only channel, but that's a mistake!

What are the main social platforms?

In practice, social media are amongst the most popular sites on the Internet[2] along with search engines. To help you set a scope for social media marketing, we've identified these key types of platforms or marketing activities in our Social Media Marketing Radar:
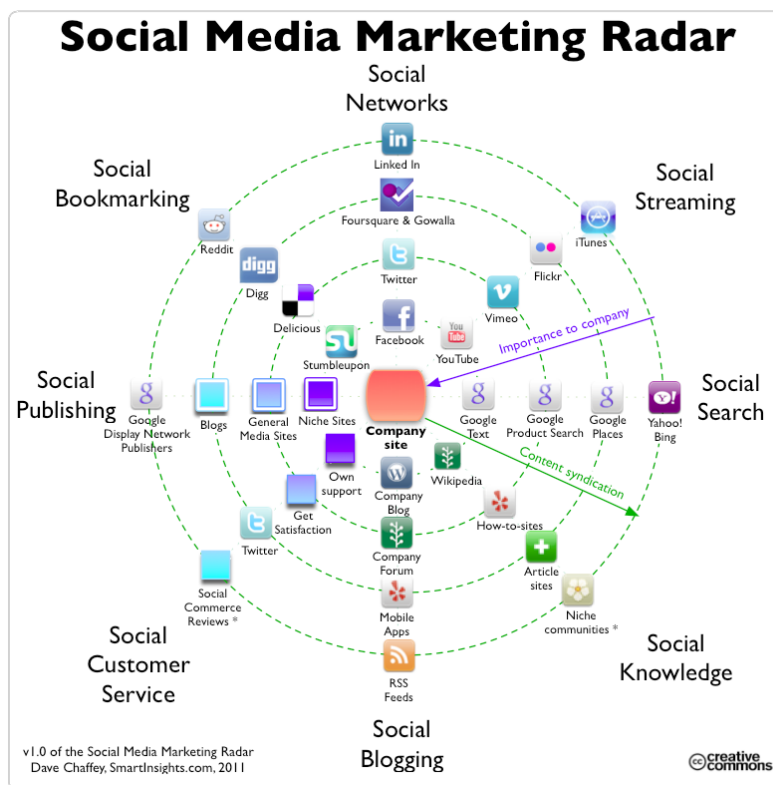
We created our Radar so it can be used to discuss with colleagues or agencies which sites warrant or deserve most attention in the different categories. Sites which are agreed to be more important which warrant more resource should be positioned towards the centre. You

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1 http://www.cipr.co.uk/content/popular-resources/best-practice-guides/best-practice-guides
2 http://www.google.com/adplanner/static/top1000/

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can see we have included social commerce* and niche communities* in other categories. It's important to start with the business goals when creating a strategy, but it's still useful to start by rating your capability in these areas against their importance out of ten:

Capability	Importance	Type of social networking
		1. **Social networks** – the core social platforms in most countries where people interact through social networks are Facebook for consumer audiences, Linked In for business audiences, Google Plus and Twitter for both.
		2. **Social publishing and news** – nearly all newspapers and magazines, whether broad or niche, now have an online presence with the option to participate through comments on articles, blogs or communities.
		3. **Social commenting in blogs** – a company blog can form the hub of your social media strategy and you can look at tapping into others blogs whether company or personal or through blog outreach.
		4. **Social niche communities** - these are communities and forums independent of the main networks, although these do support sub-groups. You can create your own community this way.
		5. **Social customer service** - sites like GetSatisfaction as well as companies own customer support forums are increasingly important for responding to customer complaints.
		6. **Social knowledge** – these are informational social networks Yahoo! Answers and similar plus Wikipedia where you can engage an audience by solving their problems and subtly showing how your products have helped others
		7. **Social bookmarking**– these are the bookmarking sites like Delicious (www.delicious.com) which are relatively unimportant in the UK except if you are engaging technical audiences.
		8. **Social streaming** - Rich and streaming media social sites - photos, video and podcasting.
		9. **Social search** - Search engines are becoming more social with the ability to tag, comment on results and most recently, vote for them through Google +1.
		10. **Social commerce** - We've left this one until last, because it's mainly relevant for the retail sector. It involves reviews and ratings on products and sharing of coupons about details.

We haven't identified mobile platforms or apps separately since all of these options will be available through Smartphones. However, proximity services like Foursquare and Gowalla *are worth specialist networks that should be considered and we've shown them in the social network section.

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Step 1
Set business goals for your social media marketing

Set goals for social media

❏ *Q. We have defined goals for social media?*

Define vision

❏ *Q. Vision set for how social media and social CRM can contribute to the organisation?*

Strategic goals for social media defined

❏ *Q. Strategic goals set for social media marketing and CRM?*

Set goals for different activities

❏ *Q. Goals for different marketing activities defined?*

Set sell goals

❏ *Q. Goals set for online and offline sales?*

Write down how your social media channels will influence sales and purchase intent by generating leads and sales which are activated both online and offline.

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_____

Set speak goals

❏ *Q. Goals set for communications?*

Write down your goals including these 5 key areas:

☑ 1. Encouraging ongoing engagement (this should come before company messages so that the "sell-inform-entertain" balance is right.

☑ 2. Communicating brand perception and key brand messages

☑ 3. Communicate updates about new products and offers

☑ 4. Encouraging dialogue to find out more about products.

☑ 5. Reputation monitoring and management

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_____

Set serve goals

☐ *Q. Goals set for customer service?*

Write down how social media will be used to deliver customer service goals

- ☑ To provide information to resolve customer service issues
- ☑ To identify discussed customer issues and resolve them
- ☑ To encourage web self-service including collaborative self-service

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Set save goals

☐ *Q. Goals set for cost-savings?*

Cost-savings are a less relevant part of the 5Ss since managing social media has incremental costs for which budget will need to be found from elsewhere. But it's as well that this issue of budget reallocation is reconsidered here.

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Set Sizzle goals

☐ *Q. Goals set for brand building?*

These are closely related to the speak goals, they explain how to add-value to customers through social media.

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Define tactical goals

❏ *Q. Have we defined tactical goals?*

The next template is designed to help you prioritise your goals. It can be used for small or larger businesses.

Table for prioritising your social media marketing goals

	Goal	5S category	Rank or score
1	Improve leads through increased reach	Sell	
2	Improve sales through increased reach	Sell	
3	Improve sales through conversion increase	Sell	
4	Improve sales through customer communications	Sell	
5	Engage customers in dialogue	Speak	
6	Communicate product and offer information	Speak	
7	Gain customer feedback from dialogue	Speak	
8	Encourage customer advocacy	Speak	
9	Collaborate with influencers and partners (E-PR)	Speak	
10	Encourage multichannel actions	Speak	
11	Encourage web self-service	Service	
12	Identify and resolve problems	Serve	
13	Reduce costs	Save	
14	Change brand perception	Sizzle	
15	Add value to customer through improved brand experience	Sizzle	
16	Manage reputation	Sizzle	

Next up, we have a template which will give you a more in-depth review of your capabilities. It's more suitable for larger organisations. It's designed for benchmarking social media capa-

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bilities across the 5S and for management of social media (in the first column).

Social media capability review template

Capability level	Management	Sell	Speak	Serve	Sizzle
1 Experimentation	**Goals**: No specific goals **Measurement**: Limited **Resource**: None specific **Buy-in**: Limited	Uses existing offers	No content hub or editorial calendar Broadcast messaging similar to other channels No network advertising	Limited service support - broadcast approach to messaging	Replicates existing brand Limited reputation monitor
2 Initial management	**Goals**: Volume only **Measurement**: Tool-specific **Resource**: Defined responsibility **Buy-in**: Recognition	Incentives to encourage engagement Specific channel offers	Basic content hub and editorial calendar Developing dialogue Social sharing encouraged Test advertising	Ad-hoc - specific requests answered	Reputation management tools reviewed Communicating social channel value
3 Integrated	**Goals**: Optimisation goals **Measurement**: Dashboards **Resource**: Defined roles **Buy-in**: Sponsorship	Cross-channel integration of offers Social-selling (if relevant) E.G. .... Facebook commerce	Defined content hub and content strategy Influencer outreach Integration of community Social recommendations (transactional) Continuous advertising	Specific support resource. Surveys of performance	Social governance policy in place Developing new forms of brand value
4 Optimising	**Goals**: Optimisation goals **Measurement**: Command centre? **Resource**: Resource for optimisation **Buy-in**: Committed to optimisation	Offline channel optimisation Social merchandising Social loyalty programmes (if relevant)	Social media optimisation Content offer and frequency optimisation Advertising optimisation	Proactive outreach to customers needing support Continuous research of needs and want	Reputation proactive - outreach Creating new brand experience
5 Integrated and optimised	**Goals**: Impacting business goals **Measurement**: Integrated **Resource**: Dynamic **Buy-in**: Core capability	New platforms evaluated and implemented rapidly. Example: mobile AB and multivariate testing	Atomisation and Syndication	Crowdsourced new product ideas obtained	Agile response to new channels

Seven steps (right margin):

1. Set business goals
- Create strategy
- Social listening and reputation monitoring
- Content and engagement strategy
- E-communications strategy
- Practical advice for core platforms
- Social media optimisation

Social media capability review template

Capability level	Management	Sell	Speak	Serve	Save	Sizzle
1 Experimentation						
2 Initial management						
3 Integrated						
4 Optimising						
5 Integrated and optimised						

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Step 2
Create your social media strategy

Getting the balance right – control, engagement or sales
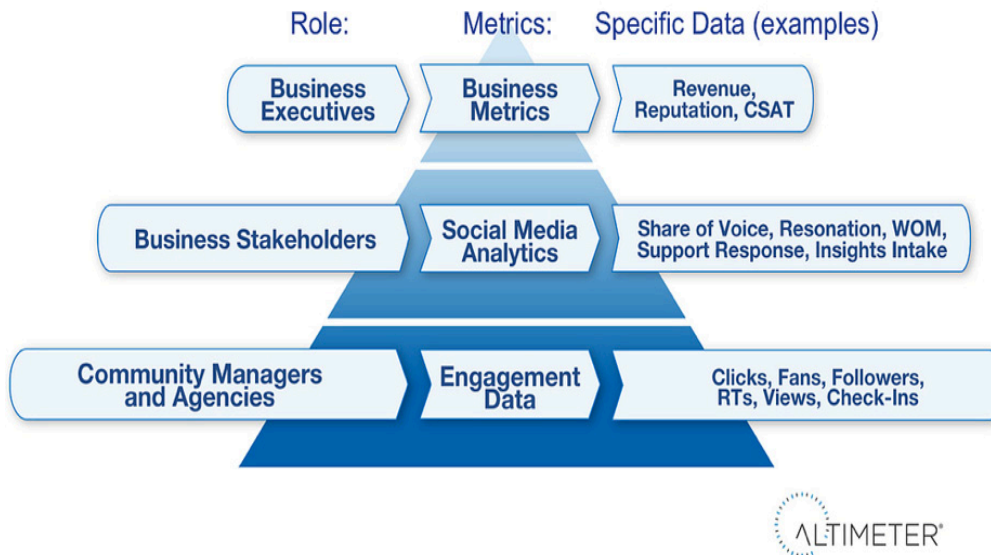❏ *Q. Scope of social media strategy defined?*

Define core activities to be managed
❏ *Q. Key social media marketing activities defined?*

Get the right KPIs to measure effectiveness in place
❏ *Q. KPIs defined*

For setting KPIs and objectives, we think the Altimeter framework is hard to beat at helping define the important types of objectives:

Source: Jeremiah Owyang, Altimeter Group[4] (with permission: Creative Commons)

You can see that there are 3 levels of KPIs:

❏ *Q. Business-level KPIs to measure contribution from social media?*

❏ *Q. Reach and influence KPIs to review reach, share-of-voice and sentiment?*

❏ *Q. Engagement KPIs to manage social media?*

The next templates show how you can link the objectives you set under the headings of the 5S with strategies to achieve these.

There are two example strategy templates and then two blank templates for you to print and complete.

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4 http://www.web-strategist.com/blog/2010/12/13/framework-the-social-media-roi-pyramid/

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Social media strategy management template (page 1)

Business Goals	Specific objectives: SMART KPIs	Strategy: Initiatives needed	Tactics: Do what?	Tools to help: Software & services?
1 Improve leads through increased reach (Sell)	n, %, quality of leads by social channel	Lead/engagement strategy; Social media optimisation (SMO); Social network advertising	Develop lead generation content and offers; Facebook info page lead campaigns	Network advertising platforms; Social sharing tools
2 Improve sales through increased reach (Sell)	n, % of leads by social channel	Social sales strategy; Social media optimisation (SMO); Social network advertising	Differential channel offers; Encourage amplification of content through sharing; Facebook, Twitter, LinkedIn Ads	Network advertising platforms; Social sharing tools
3 Improve sales through conversion increase (Sell)	Conversion rate to lead and sale by social channel	Social media optimisation (SMO); Social commerce (transactional sites)	Integrate testimonials; Implement reviews and ratings (if applicable)	Social commerce platforms; Reviews and ratings tools
4 Improve sales through customer communications (Sell)	n, % of leads by social channel	Ecommunications strategy; Customer preference research	Create/improve content hub; Editorial calendar	Content hub platforms; E-communications platforms
5 Engage customers (Speak)	n, quality of interactions on social presence	Customer preference research; Social media optimisation (SMO)	Communications encouraging dialogue; Cross-channel social engagement; Enewsletter recruitment to social	Social sharing widgets
6 Communicate product and offer information (Speak)	n product and service alerts	Ecommunications strategy	Create/improve content hub; Editorial calendar	Content hub platforms; E-communications platforms
7 Gain customer feedback from dialogue (Speak)	n, % interactions by channel	Create customer feedback programme and panel	Regular surveys about communications and products and services	See http://bit.ly/smartfeedback
8 Encourage customer advocacy	Amplification and network growth RTs, Shares	Develop links to other customer loyalty programmes	Customer advocacy offers	Loyalty management tools

Set business goals

Create strategy — 2

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Social media strategy management template (page 2)

Business Goals	Specific objectives: SMART KPIs	Strategy: Initiatives needed	Tactics: Do what?	Tools to help: Software & services
9 Collaborate with influencers and partners (E-PR)	n, quality of influencers reached; Share of voice; Sentiment polarity	Influencer identification; E-PR initiatives	Segment and target influencers; Resource and process for outreach programme	Influencer identification; See http://bit.ly/smartlistening
10 Encourage multichannel actions	n, offline influence	Multichannel integration	Offline communications; Channel incentives	Coupon tracking tools
11 Encourage web self-service	n, % web self-service; Service quality levels	Management of social service channels; Define service levels	Create, resource and manage social service channels	Web self-service tools
12 Identify and resolve problems	% negative product mentions; % fix completion	Social customer service strategy	Customer service outreach	Social listening / reputation management teams
13 Reduce costs	Cost of managing social media against returns	Define responsibilities for managing social media; Staff usage policy; Social governance policy	Management of staff usage	Collaboarative internal tools
14 Change brand perception	Net promoter score and advocacy rating	Brand personality strategy	Transform brand personality	Campaign development
15 Add value to customer through improved brand experience	Net promoter score and advocacy rating	Competitor benchmarking	Campaign integration	Campaign development
16 Manage reputation	Sentiment polarity against share-of-voice	Social governance policy	Mention response management	See http://bit.ly/smartlistening

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Create strategy

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Social media strategy management template (page 1)

Business Goals	Specific objectives: SMART KPIs	Strategy: Initiatives needed		Tactics: Do what?		Tools to help: Software & services?	
improve leads through increased reach (Sell)							
2 Improve sales through increased reach (Sell)							
3 Improve sales through conversion increase (Sell)							
4 Improve sales through customer communications (Sell)							
5 Engage customers (Speak)							
6 Communicate product and offer information (Speak)							
7 Gain customer feedback from dialogue (Speak)							
8 Encourage customer advocacy							

Set business goals

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Social media strategy management template (page 2)

Business Goals	Specific objectives: SMART KPIs	Strategy: Initiatives needed	Tactics: Do what?	Tools to help: Software & services	KPIs: Track by?
9 Collaborate with influencers and partners (E-PR)					
10 Encourage multichannel actions					
11 Encourage web self-service					
12 Identify and resolve problems					
13 Reduce costs					
14 Change brand perception					
15 Add value to customer through improved brand experience					
16 Manage reputation					

Set business goals

Create strategy (2)

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Step 3
Social listening and online reputation management

❏ *Q. Are we monitoring and responding to conversations about our brand*?

In this step we cover how to put in place the people, process and tools needed for effective listening. They are introduced in this table, so you can see how you score now before we go through the details.

Social listening activity	We don't do this Score 0	We plan to do this Score 1	We are doing this? Score 2
Q1. The need for structured, resourced social listening is agreed?			
Q2. We have someone responsible for social listening?			
Q3. Defined keyword groups for market, brand and products exist?			
Q4. Effective social listening tools are in place?			
Q5. Reporting and KPIs are in place for conversation volume, share and sentiment?			
Q6. We have a social governance policy defining how to evaluate and respond to negative and positive mentions?			
Q7. Customer concerns are identified through social listening tools and responded to accordingly?			
Q8. Potential influencers and partners are identified through listening tools and acted-on?			

If you mostly score 2s, with some 1s, you have a good approach in place already. If not, there is room for improvement in how you use people, process and tools to listen and respond to online conversations. Read on to discover how to define these.

Social media keyword analysis

❏ Q. *Which keywords should I listen out for*?

❏ Q. *Which type of KPIs should I use*?

Appropriate listening and reputation management tools selected

❏ *Q. We have reviewed and selected the best reputation management tool for our needs?*

Considerations

Ask yourself:

❏ Who is the owner of the listening process?

❏ What is the process for reviewing and responding

❏ Use the support teams where possible to help speed up initial configurations

❏ Be clear on what you are monitoring & why?

Set business goals

Create strategy

Social listening and reputation monitoring

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Content and engagement strategy

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Define approach for responding to brand mentions
❏ *Q. Approach for responding to brand messages defined?*

Define or refine social media governance policy
❏ *Q. Social media governance policies defined?*

Define relevant influencers
❏ *Q.Have you defined the top influencers in your market?*

Deliver customer service through social channels
❏ *Q. Approach for delivering customer service reviewed?*

Use customer concerns and feedback to inform marketing
❏ *Q. Feedback loop to use customer insight to inform future marketing?*

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reputation monitoring

Content and
engagement strategy

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Step 4
Define content and engagement strategy

☐ *Q. Do we have a content strategy to engage our audiences*?

You may well know the analogy of social media as bonfire? A good level of conversation in a community won't happen organically in most cases. The conversation needs to be led and content is the what feeds the fire. In Step 5 we will review what's needed to communicate the content you feature. But in this step we focus on the content marketing needed to engage your audience.

An approach to manage the creation of content for engagement needs a content marketing strategy. These are the questions to ask about your content marketing strategy.

Content media strategy	We don't do this Score 0	We plan to do this Score 1	We are do-ing this? Score 2
Q1. We know the goals we want to achieve through our content?			
Q2. Business case for creating content established?			
Q3. KPIs and tracking for reviewing content effectiveness in place?			
Q4. Requirements of content for main audience types (personas) defined?			
Q5. Categories of content needed to engage audience defined?			

As before, if you mostly score 2s, with some 1s, you have a good approach in place already. If not, there is room for improvement in how you use people, process and tools to listen and respond to online conversations. Read on to discover how to define these.

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Step 5
Define social media communications strategy

☐ *Q. Social media communications strategy defined*

Once your content marketing needs or rather those of your audience are sorted, then you can turn to how these are communicated.

Social media communication strategy	We don't do this Score 0	We plan to do this Score 1	We are do-ing this? Score 2
Q1. E-communications strategy defined including...			
Q2. Content value: types and formats defined?			
Q3. Regular content update frequency defined (including syndication of content to offsite)?			
Q4. Editorial calendar used to manage content formally including integration between media?			
Q5. Content hub platform to manage publication and syndication of content selected?			
Q6. Defined internal resource to create and manage content and discussions in place?			
Q7. Options for external sourcing of content reviewed?			
Q8. Content syndication to other platforms managed?			
Q9. Outreach to other sites managed?			
Q10. Communication through advertising, PR and email marketing of social media/community proposition of content proposition to existing customers and prospects?			

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Step 6
Define approaches for the core social media platforms

Introduction

In this step you should review the relevance of each of the main social platforms and define a communications and engagement strategy for how you can best use them.

The secret to success for making effective use of each social media platform is to work out which common approaches you can use and which approaches need to be unique for the platform.

Each social media platform can serve a different purpose for the individual, business or organisation. You will find that they attract different users and offer different features to engage them. The tone of voice used and interactions are quite different too, so a "one-size fits all" communication strategy for each platform is definitely not the way forward. But you can and should use common tools to communicate through each of these platforms.

You will also find, that they naturally differ in their importance to your business, so the first question to answer is which are the priorities now?

Select the social media platforms to prioritise on

❒ *Q. Social media platforms to prioritise on defined?*

Follow-up questions, to help answer this question are:

Which social platforms are delivering the most now

❒ *Q. Analytics used to deliver reach, value and engagement delivered by different platforms?*

Social platforms audience profiled?

❒ *Q. Profile audience to review intersection with your target audience?*

Customer-preferences for content and interactions on each channel?

❒ *Q. Customer research on social platforms and content preferences reviewed?*

Define a method for managing content across social media platforms

❒ *Q. Method for managing content across platforms defined?*

Facebook strategy

❒ *Q. Approach to get better results from Facebook marketing defined?*

Twitter strategy

❒ *Q. Approach to get better results from Twitter marketing defined?*

LinkedIn strategy

❒ *Q. Approach to get better results from LinkedIn marketing defined?*

Google Plus strategy

❒ *Q. Approach to get better results from LinkedIn marketing defined?*

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Own community strategy

❒ *Q. Relevance and approach to get better results from your own community platform reviewed?*

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Step 7
Social media optimisation (SMO)

☐ *Q. Our Social Media Optimisation (SMO) approach is effective*?

Once you have your content marketing up and running or when you're creating a plan for content marketing, we think it's worth thinking carefully about SMO.

☐ *Q. Social media communications strategy defined*

Once your content marketing needs or rather those of your audience are sorted, then you can turn to how these are optimised. The questions to consider about your SMO are based on the 4 areas of our RACE framework.

Social media communication strategy	We don't do this Score 0	We plan to do this Score 1	We are do-ing this? Score 2
Reach more: ☐ Q. Increase amplification of message through content quality ☐ Q. Improve use of outreach to influencers ☐ Q. Optimise use of advertising to promote networks			
Act more: ☐ Q. Encourage more prospects to become members of community on social network ☐ Q. Improve ease of sharing on site through integration of content ☐ Q. Improve use of buttons for sharing ☐ Q. Increase number of comments and other interactions on content			
Convert more: ☐ Q. Signposts and promotions linking social media usage to sales ☐ Q. Use of promotions, advertising and retargeting to encourage sales ☐ Q. Sales offer optimisation ☐ Q. Use of cross-channel promotions to encourage sale (e.g. coupons)			

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Social media communication strategy	We don't do this Score 0	We plan to do this Score 1	We are do-ing this? Score 2
Engage more: ☐ Q. Encourage customer use of social media using email integration or offline media? ☐ Q. Improve integration of social media channels and offline channels ☐ Q. Improve use of social media for custom-er care and customer feedback			

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