

Simple Social Media Strategy Template

How to cut through the hype and develop a practical social media strategy for your business

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Opinions and commentary about social media and business strategies are drawn from the author's observation, study and experience and are provided for information and general education purposes only.

The social media landscape changes on a daily basis and any reputable social media strategist or consultant will tell you we are all learning as we go.

Strategic and tactical social media decisions should not be made solely on the basis of the commentary and suggestions in this ebook and should be tested against the specific business's or individual's business goals, resources, values, culture, and market context: it is recommended that this be done in consultation with a suitably qualified/experienced social media specialist.

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Index

Disclaimer and Copyright Notice	3
Index	4
About the Author	5
Introduction	6
A quick exercise	11
The 9 Point template	12
Commitment	12
Culture	14
Market	16
Goals	21
Resources	23
Listening	26
Engaging	28
Technology	31
Evaluation	33
A quick, follow-up exercise	36
Next steps	36



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He understands the new landscape of business, the challenges and the opportunities.

A business owner for over 20 years, with coach training from Coachville.com and a Social Media Strategist certification from the S3 Academy (formerly Social Media Academy), Des has the experience and knowledge to help you grow your business in this new environment of social business.

Find out more at Des's website [Des Walsh dot Com](http://DesWalshDotCom) and while you are there check out his blog for regular business insights and updates.

Des has also been a featured writer on social media for thought-leading blogs [Business Blog Consulting](#), [Social Media Today](#), [My Venture Pad](#), [Customer Think](#) and [MYOB The Pulse](#), and on leadership for [Market Leadership Journal](#). His own [Des Walsh dot Com blog](#) was one of the first to be featured in the Social Media section on [Alltop - All the Top Stories](#).

You can find Des on [LinkedIn](#), [Twitter](#), [Facebook](#) and other places on the social web.





Introduction

“We don’t have a choice about whether we do social media. The choice is how well we do it.” Erik Qualman, Creator of the viral video series Socialnomics

For innovative, agile businesses, there is no question about *whether* to incorporate social media in their business strategy. But for many there is a question about *how* to do so.

Part of the challenge is that many of the solutions on offer seem to require a more or less dramatic commitment of people and money to an area of activity that for many companies is still quite unfamiliar territory.

Or the examples of success are about new companies, with younger, tech-savvy leadership and workforces that are predominantly young and do not have to be persuaded about using social media for business.

So some, especially small, older established businesses with a predominantly more mature aged leadership and workforce, take the line of least resistance, and do nothing.

Or make token gestures like setting up Facebook or Twitter accounts but not really incorporating them into any serious strategy. Which is a shame. And risky.

My **Simple Social Media Strategy Template** has been designed to help even the most conservative and cautious company get started on social media and build its presence and activity there strategically and systematically.

So in this ebook you will find a **simple, manageable approach** to developing a social media strategy, designed originally for use by small or medium-sized businesses, and usable by micro, two or three person businesses or even by the members of the growing, global tribe of “solopreneurs”. It’s also been used by at least one very large organization, [NATO](#).



Acknowledging Society3 Academy

In developing my strategy template, I have benefited greatly from having completed the Certified Social Media Strategy program with the California-based Society3 Academy (formerly Social Media Academy) a leading business school for applied social media.



The **S3 Academy** developed its own methodology for creating a social media strategy. I have used that methodology successfully in my consulting to companies wishing to establish a robust, “whole of business” social strategy and I acknowledge the influence of that methodology on the construction of this template.



You don't have to be tech-savvy to use this template

The 9 point, Simple Social Media Strategy template is designed for use by any business owner or executive and the wording is as jargon-free as I can make it.

But there is some jargon. For example, you will see references to a *corporate* structure and *corporate* decision-making processes. It is however written with the aim of **helping small business as well as large**. So for the two or three person business, or even the solopreneur, it is still important to work through the various items and develop a coherent strategy. It's not only in medium to large corporations that poor or

negative results can be attributed to a lack of clear strategy and agreements, as any small business owner knows only too well.

And then there's the **"C" terminology**. In today's flatter corporate structures and in a lot of small and micro businesses, the old "C" terminology – Chief Marketing Officer/CMO, Chief Financial Officer/CFO, Chief Executive Officer/CEO, C-level, C-suite and so on – may just not apply to a lot of businesses. But it is still a convenient way to refer to what I call *the people who make decisions and carry the can* (or are supposed to). So the idea is to apply that as it fits for your business – or your non-profit organisation or government agency.

Own the strategy, even if you outsource some implementation

The strategic approach set out in this ebook is primarily for businesses that want to have **clear ownership of their social media strategy**.

Certainly there are many agencies offering to take care of the whole social media process and some businesses do prefer to outsource the whole process, from strategy development through implementation and reporting.

But I believe that for real success with social media, the *business needs to be a player*, not relying wholly on outsourcing.

Why? Because at the most fundamental level, customers are becoming more and more sophisticated about communication on the social web.

Today, some customers may not know the difference between an authentic communication from you or one of your in-house team and a communication from a third-party agency on your behalf. But with more and more of your customers becoming social media savvy, *tomorrow* that customer will surely know the difference and react accordingly. And that may not be to your benefit.

But if you do choose to outsource some or all of the processes and activities involved, your company still needs to be involved, at the ownership or C-level, in the development of and sign-off for any strategy.

It's not at all that every business has to handle its whole social media engagement in house. But the **smart move is to understand the process and manage it**, with the rider that when there is direct engagement by the company's leaders, compared to when the engagement is filtered through an agency, there is likely to be a *qualitative difference in understanding how it all works*.

The Simple Social Media Strategy Template uses nine key reference points, which are applied systematically to the various **stages** of strategy development, execution and review:

- initial diagnostic
- strategy development
- implementation
- assessment and
- refinement.

Specific documents such as checklists that may be developed for planning and implementation, based on the template, will have different configurations depending on such factors as the size of the company, industry and the existing or developed familiarity of staff with social technology and social media etiquette.

The nine **reference points** are:

1. Commitment
2. Culture
3. Market
4. Goals
5. Resources
6. Listening
7. Engaging
8. Technology
9. Evaluation

A Quick Exercise

To help get your strategic thinking going, on a sheet of paper or note pad, or in your electronic note pad of choice, write down now, without reading on, what your thoughts and expectations are on the following questions. Hint: there are no “right” answers!

- 1. What need does your company have now which social media could help you meet?***
- 2. What have you tried so far with social media for your business and how useful has that been?***
- 3. How many hours a week do you think you will personally have to spend on it?***
- 4. How many hours a week of company people's time (including yours) will have to be spent on it?***
- 5. What other cost factors can you think of?***
- 6. What do you think can go wrong?***
- 7. What is the cost of doing nothing?***

Then put those notes aside while you work through the template exercise. We'll come back to them at the end.

The 9 Point Template

1. Commitment

High level corporate commitment is a key element of a successful strategy development and implementation.

In other words, the business owner/CEO must own the strategy.

Such commitment is no guarantee of itself that everything will be done well, or even that there will be no major problems encountered. But if that commitment's not there, even the best articulated strategy may well be doomed to failure.

The ideal is for the CEO to take the initiative in having a corporate social media strategy developed. The next best option is for the CEO's support and commitment to be sought. If there is a board of directors, I would be recommending that this should also be on the agenda for the board, but with some approaches to corporate governance that might not be considered necessary or appropriate.

The need for such top level commitment applies equally in small and even micro businesses or partnerships, where there is often a temptation to just contract out the whole process without really *owning* it.

Whatever is done should be appropriate to where the company is on the social media engagement path. Some companies are already active, strategic users of social media, others are still thinking about it, still others have not till now thought about it in any strategic way.

Many are using specific tactics, say trying out a blog, or a Facebook profile, or a Twitter account, but without an *articulated strategy*.

Only a few short years ago, social media was still new enough that in some companies there was a process underway of allowing some experimentation rather than formalizing a strategic approach.

And back then, when the social web revolution and its disruptive and transformative

potential were less well understood in executive suites and corporate boardrooms or by many small business owners, people down the line who understood what was happening and saw the need for action would sometimes just press ahead, operating daringly on the principle that it was better to “seek forgiveness not permission”.

For smart companies, the world has moved on from that ad hoc, tentative, experimental phase: more and more companies now understand that **engaging with social media *strategically* is a necessity, not an option.**

What may not be so well understood is that a ***genuine corporate commitment* is needed to make sure of the success of any strategy**, not just a permission or encouragement for one or other department or individual to experiment.

If the CEO of the company, or the C-suite generally, want to stand back on this issue and not commit one way or another, that’s a sure signal that the whole initiative will be questioned or even dismantled at the first bump in the road – and there will surely be bumps.

Even if the development of the strategy and the implementation are delegated, that should be to a C-level executive or at least a senior manager who can be expected to keep the CEO/C-suite in the loop as the strategy develops and is implemented.

If there is *not* a readiness to commit at the C-level, then I would be questioning whether the case for a social media engagement has been made effectively within the company. In that case, it might be necessary to ask the question “why social media?”, before the “how social media?” question can be effectively addressed.

The question of C-level commitment is closely connected with the next point in the template, *Culture*.

2. Culture

Conversations about social media in business typically start with **questions about tools**.

“Should we have a Facebook page?” “Should we be on Twitter?” “Should we have a blog and if so how do we go about that?”

These are perfectly reasonable questions.

But trying to answer those questions *in a strategic vacuum* is usually unproductive or even counter-productive.

Before any decisions are made about social media platforms or tools, there has to be a serious discussion about **company objectives and social media strategy**.

That discussion will include making sure your company objectives and social media objectives are aligned. For a simple, 5 step process to help achieve that, see my blog post [How to Align Your Social Media and Business Objectives](#).

Then take a good, hard look at **company culture**.

Because a social media strategy that doesn't fit with company culture is *bound to fail*.

And from case studies and from anecdotes shared by social media practitioners, it is clear that **the toughest challenge with social media or social media implementation is likely to be not about platforms or tools or even about budgets, but about culture**.

At the risk of over-simplification, what I mean here by *corporate culture* is what was simply but elegantly described (Deal & Kennedy 1982) as “the way we do things around here”. Of course, “the way we do things” will often be explained in some detail in documents such as company codes of conduct. But not always.

Cultures can be predisposed to change or resistant to it. It's normal in any business or other organization to have a mixture of both.

Typical corporate culture issues that affect the development of social media strategy, negatively or positively, are:

- the predominant style of leadership
- how information flows
- how decisions are communicated
- how different departments relate to one another.

Don't take the easy way out by skipping this step.

There is nothing surer than that the development and implementation of a social media strategy will be affected, positively or negatively, by the company culture – both in its formal expression and in its informal manifestations.

On a more positive note, it's worth considering that a well thought out, well executed strategy for social media *can help transform* corporate culture for the better – for example by breaking down silos, helping people communicate and collaborate more effectively and especially by improving the customer experience.

This applies also for small, even very small, one or two person firms

When you think about that description of company culture as “the way we do things around here”, it applies to small and very small businesses.

3. Market

A **market scan** is a next step in developing a social media strategy.

Just as with any business strategy, for a social media strategy to be successful **we need to know who our customers, prospects and other stakeholders are.**

And our **competitors.**

We need to build a picture of their **actual or likely online behavior and especially whether and how they use social networks.**

We also need to have a crystal clear understanding of what our brand is, how it is perceived in the marketplace and what our brand promise is.

And as with any market investigation, it is probably a good idea to **put prejudices aside** and discover what *facts* we can about these issues.

For example, many mature age business executives who are not themselves active on social networks, assume that social networking is not relevant for their business because their business is not catering to a young demographic.

But the fact is that more mature aged users are taking to social media at a rapid rate.

A Pew Internet [social media research update](#) in October 2015 found that usage among those 65 and older had more than tripled since 2010 when 11% used social media. Today, 35% of all those 65 and older report using social media, compared with just 2% in 2005.

A recent article on the latest global research on [social media usage](#) states that “... the social networks are now at a stage of maturity where they give opportunities to reach all age and gender groups”.

Companies ignorant of these trends, or knowing about them but choosing to ignore them, may be missing out on real business.

Actually, I find it quite surprising that, when I mention statistics and trends of this kind to mature age business people, some, instead of seeing a possible opportunity for their business, change the subject or even, in some instances, become quite dismissive of the idea.

It's not just the older executives. I find people of various ages, apparently without having done any research on the matter, having very definite, unresearched opinions about whether and how their target market groups behave online and specifically regarding social networks.

So a company developing a social media policy may need not only to get up-to-date information about how the people in its market are using social media, but also to ensure that decisions about the development of the strategy are being *informed by empirical data and expert analysis*, rather than by pre-set opinions.

For some companies, as well as collecting data, it may be necessary to arrange for some fresh thinking!

B2c or B2B?

A useful distinction about markets in relation to social media is between companies marketing directly to consumers (Business to Consumer or B2C) and those marketing exclusively to other businesses (Business to Business or B2B).

Many of the social media case studies or success stories you will read about or see reported on television will be from the B2C sector. but there will be often significant differences in social media strategies and tactics between B2C and B2B.

One of the best ways I have found to keep up to speed on B2B developments in social media is to join online groups which have that as their focus. Start with a groups search on "B2B social media" on LinkedIn or Facebook, or a similar search for Google Plus communities. There are many such groups, so you will probably need to check out a few before you find the ones that are right for you.

Where to start with market analysis?

If your company has a media department or agency which is social media savvy (it doesn't always follow, but sometimes companies have in-house or contracted resources that are under-utilized for social media) then you can brief them to do some analysis and report.

And there is no shortage of companies with the tools and expertise to help you analyse your market in terms of social media usage and such important factors as which social networking platforms are preferred by your target group customers and/or people who may influence their buying decisions.

But if you are a small business that kind of externally contracted research might not be in your current budget. You may have to start with in-house resources.

Where on social media are your ideal clients and what do they do there?

Assuming you have at least basic information about your ideal clients, age demographics, gender proportions, location and so on, the next thing you want to establish is where are they to be found on social media, as in what platforms (Facebook, Twitter, LinkedIn and so on) and what do they do there.

For the big picture, such as what proportion of your target age group is active on social media, there is plenty to be discovered online, free.

A good example is [Digital in 2016](#) WeAreSocial's amazing "compendium of digital, mobile and social data, trends and statistics", with 537 slides.

For the USA, Pew Research has been gathering and explaining internet and social media data for years now and is continually producing interesting summaries and analyses. See for example [The Demographics of Social Media Users](#), published in August 2015.

For Canada-specific statistics, see for example the report [Canadian Social Media](#)

Usage and Online Brand Interaction.

And for the UK, the [Rose McGrory Social Media Statistics 2016](#) report is the fifth annual roundup of those statistics.

Australia has the annual [Sensis Social Media Report](#) on how Australian businesses and people use social media.

For these and other countries, a Google search will provide a range of articles providing relevant statistics.

For your current customers and – with a bit more effort – people you are actually marketing to, one of the best ways to find out is to ask them. You could do a survey, or commission someone experienced to do one. If you don't have a budget to pay someone to do that, you could use one of the free survey tools, such as [Survey Monkey](#) or [Google Survey Forms](#). Or call them and take notes.

A tip: frame your inquiry by explaining that you are wanting to provide even better service by having a better understanding of what social platforms your customers mainly use, how much time they spend on particular platforms in a week, and so on. Make the questions easy to answer and keep them brief. Not everyone will answer but if you pitch the survey well, many of your customers will surely appreciate your wanting to provide them more up to date service.

Don't forget other stakeholders

It is also important, in looking at behaviors of various groups online, to consider not just your customers and prospects, but **other stakeholders and other industry players, including competitors**. That may not be essential in the early stages of mapping a strategy, but it should be built in sooner rather than later.

For example, given the interactivity and real-time immediacy of social media, knowing that a competitor has a team of people dedicated to managing that company's presence online could be an important factor in developing your own company's strategy.

Similarly, knowing how much or how little your competitors are engaged with their customers through social media could help you establish whether you are entering this field as an early or late starter for your industry sector or location, and what that means in terms of how you shape your strategy.

Whatever the results of your research, never let anyone tell you it's too early or too late. On the one hand there is always first or early mover advantage and, on the other, online business is still very much in growth mode.

And it's important to remember that this will not be a once-only, set-and-forget exercise. With social media, as with marketing generally, reading the market and determining how you will engage with it is an ongoing process.

4. Goals

Many companies approach social media initially as a way to get their message out more effectively and see social media as offering, in effect, a *bigger megaphone*.

In one way it does, but there is a lot more to the picture than that, and it is essential to get very clear about the company's objectives and goals in setting up a social media strategy.

Part of that process is to keep in clear focus the fact that **social media is interactive**. The customer can now not only be heard, but heard by many more people than ever before. And our customer, who wants to be heard also by us as well as by others, has resources available to make a positive or negative impact on our brand, depending on whether we choose to listen and respond transparently, or not.

In other words, customers can now talk back and if we can't or won't listen to them, *they* will be the ones with the megaphones, telling all and sundry what they think of our brand.

Goals must be measurable

To be useful, our social media strategy must have goals and they must be measurable in some way, whether quantitatively or qualitatively.

This is not about simplistic, older Web measures such as “getting hits” or being listed first on Google, although part of your overall strategy will be almost certainly be concerned with measurement of online traffic and search engine results.

It is about figuring out, from what you know about social media, what are the priority needs of your company which a social media strategy might help you meet, and defining those needs, and the means to meet them, in such a way as to be able to judge at certain points in time how well or otherwise you are doing.

Each company will have its own goals for social media. Here is a **starting list of possible goals, for your consideration**:

- Build brand awareness
- Generate leads
- Increase sales
- Establish thought leadership
- Build relationships with customers
- Engage customers as brand evangelists
- Get customer input for product and/or service improvement
- Improve internal communication
- Improve departmental and/or company-wide collaboration

Each of those will be measurable (although that may not be immediately obvious for some of them).

For a company not yet practised in operating in the social media environment, it is suggested that no more than **three key goals from such a list be chosen in the first phase**, say at least for the first six to twelve months. Trying to achieve too many goals at once will very likely result in confusion and disillusionment.

For a company which is particularly nervous about engaging more directly with the public via social media, one way forward can be to *experiment with some internal goals* – connecting better with internal customers, if you will – so that everyone can get more comfortable with the idea of using social media tools and processes “behind the firewall”, before embarking on a more public-facing strategy. For this you can use a wiki¹ for group collaboration, or team communication tools such as [Slack](#) or [Yammer](#).

¹<http://en.wikipedia.org/wiki/Wiki>

5. Resources

One of the most business-unfriendly myths about social media is that it is all free. “Won't cost you anything.”

Just because it does not cost anything to sign up for a Twitter account, or Facebook or many other social media services, does not mean there will be no cost in being active on social media.

The reality is that it will cost you.

At the very least you will have to incur the cost in terms of the time spent by staff on building your company presence on the social web, responding to feedback and so on. And as you get into social media more intensively there are other costs that can reasonably be incurred.

But what you can reasonably expect is that, with a well-developed and well-executed social media strategy, you will get more value for your outlay, more impact for your spend, than by depending solely on traditional ways of promoting and positioning your company.

It is also worth bearing in mind that **there is a cost involved in not doing anything.**

If you accept that social media has changed the way we do business, then you will not have a problem in seeing that, by *not* taking strategic action, you can be effectively missing out on the profitability implicit in the new possibilities offered by social media.

What I recommend in the first instance is to **build a basic database of known or anticipated resources and the related costs**, with a timeline for when various costs might be incurred. This will in due course be integrated with the overall company budgeting process and for larger organizations may need to be developed more elaborately even at an early stage.

There is a potential catch here, in that there is a corporate learning process to become familiar with what services are available, how they fit into a plan for meeting your

corporate social media objectives and whether you need them immediately, soon, or later.

At the most basic level, to get started, you can set up a spreadsheet to look at resources, which could be on a grid something like this:

	Current	Needed	Cost	When
People				
Services				

Thus, under **People – Current**, you might include, for example, a nominated, existing staff member at one day a week for three months of strategy development and implementation, to start immediately: the cost will simply be – again by way of example – at one day a week, with whatever on-cost factor your financial people indicate. You might also decide that you may need additional part-time or full-time staffing at a specific time and include provision for that.

Similarly with **Services**. Given that you may need to do more research and strategic thinking before you know what costs you are up for, and knowing some services will be free to begin with, you may want to not spend much time on this section at the early stages.

One way to manage the cost factor is to **review your existing marketing budget** and identify some re-allocation to your social media strategy.

Or if you are looking more at developing internal communication and collaboration, the budget re-allocation might come from communications or, say, training.

These examples hopefully illustrate why there is a need for serious C-level involvement in the development, implementation and monitoring of a social media strategy.

There is a **dearth of literature**, online or offline, to help businesses get a sense of market rates for social media advice and services. The only document I know which provides an at least indicative overview is a blog post from four years ago, [How Much Does Social Media Cost Companies in 2012?](#) by the very well respected social media

consultant, trainer and speaker Mack Collier.

6. Listening

“Communication, whether inbound or outbound, is now powered by conversations, and the best communicators always start as the best listeners. And the best listeners are those who empathise while they are listening.” Brian Solis, Engage! ²

The easiest way I know to explain **why listening is so crucial for a successful social media strategy** is to use the examples of a cocktail party or, if you prefer, a barbecue or networking function.

We've surely all had the experience where you are in a group and someone new rocks up and starts talking about themselves, then keeps talking about themselves, without waiting to find out what people are discussing, and without listening to any of the existing conversation.

It's just as annoying when that happens online, on social networks.

And yet companies – and politicians – who don't understand that, will often open their presence on social platforms with announcements about themselves. Following up with more announcements about themselves and their special, last chance deals. They go on doing that and you have to ask yourself whether they wonder from time to time where all this “engagement” is that people talk about!

Well, as in life generally, **the engagement online happens where people listen**, not where there is just someone with a megaphone telling us to *buy their stuff or vote for them*.

Not that you have to be everywhere on the web, constantly listening. There are tools to help and the good news is that some of them are free or, like the social media dashboard HootSuite, have free versions you can start with. So you can experiment without a direct financial cost and start to learn what you really need to know and for which results you might have to investigate some of the paid services currently proliferating.

²Engage! the Complete Guide for Brands and Businesses to Build, Cultivate, and Measure Success in the New Web, by Brian Solis, p 6

For example, you can set up HootSuite to show you when your company is mentioned, or where various “keywords” are appearing.

You can use tools called *readers or feed readers* to get information brought to you via the syndication process known as RSS. This process can aggregate conversations from various groups or give you updates on what might be posted about your company or industry on blogs and other web sites.

Now that the very popular and widely used Google Reader has been axed, many people have chosen the excellent Feedly service as their new, preferred reader.

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The better place to curate and read what matters to you.

Get Started

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Under *Listening* we also include the term **Monitoring**, which we see as essentially a more attentive, generally more quantitatively measured form of listening.

There are many free social media monitoring tools (or free at the entry level). See examples in the blog post (updated to June 2016) [46 Free Social Media Monitoring Tools](#).

There are various premium (i.e. paid) services which will help you get more in-depth information about online communications and conversations of interest to you. See for example the five services listed in the post [Premium Social Media Tools](#).

7. Engaging

As Brian Solis put it succinctly, “Engage or die.”³

In his excellent introduction to social media, [The Digital Handshake: Seven Proven Strategies to Grow Your Business Using Social Media](#), social media specialist Paul Chaney suggests that there are **two ways to engage with social media**. One is relatively more passive – joining a conversation that is already underway: the other is more proactive – “starting a conversation about your company, products and people”.⁴ As the author points out, it doesn't have to be either/or.

And even if your strategy focuses more on your creating a space and conversation rather than simply attaching yourself to other conversations, you will still have to make yourself known and participate in the conversations organised and managed by others. To use an offline, day-to-day life illustration, we are probably more likely to attract people to our own functions if they have seen us attending and supporting theirs.

As well as helping you raise awareness of your brand and products – and that does *not* mean constantly plugging your brand and products – being engaged in conversations where your customers and prospects are can be of inestimable value, especially if anything negative should be aired about your company.

As a known member of the community, you will be in the picture faster than if you have to wait to see something in the newspaper, and because you are a participant you will know how to speak to that group and put your company's point of view in terms they will understand.

That of course presupposes you and your company have a ***commitment to transparency and honesty*** in your public communications.

Which does not mean you have to tell people *everything*. Sensible people understand

³Engage! - as cited above, p xiii

⁴The Digital Handshake: Seven Proven Strategies to Grow Your Business Using Social Media, by Paul Chaney

and accept that some things must be kept confidential.

But it does mean *you level with people as far as you can and you undertake to fix what is broken.*

There are several examples of companies not engaged in the conversation who reacted slowly and ineffectually when a “blogger storm” blew up. The classic story is of computer giant Dell's failure to respond initially to blogger Jeff Jarvis, in the story which became tagged as “Dell Hell”. See the now legendary post [“Dell lies. Dell sucks”](#).

The upside of that story is that Dell went on to take a leadership position in its adoption of social media as a key element of how it does business: for more information on this check out Jason Falls' post [Why Dell is Still a Great Case Study](#).

There are other examples of where the prompt, engaged presence of a company representative online has meant that problems were managed more rapidly and trust was maintained or re-built. The [Domino's Pizza Crisis](#) is often held up as an example of what can go wrong and how even an apparently disastrous situation can be turned around.

If you are concerned about how to handle such negative situations, as many business owners quite understandably are, I recommend you develop sooner rather than later a set of social media guidelines for your company – even if it is as small as a two person or even one person business!

An example of social media engagement

Here is a small example of what I mean about *being engaged*, from our company's recent experience.

A new mobile/cell phone was not delivered as promised, and after very unsatisfactory calls to help lines (one at least diverted to a call center in another country) I went on Twitter after business hours and flagged this, with the Twitter identities of the telecoms company and the delivery company included. The telco people who were on Twitter picked up my tweet in a matter of minutes and were quickly in contact with us with the aim of getting the matter sorted. We never heard from the courier

company.

While both companies had Twitter accounts, one was listening and engaged, the other was apparently doing neither.

Possibilities for participating in the conversation of the social web

There are many possibilities, both for joining in others' conversations and for starting your own. These include:

- visiting and contributing helpful information and comments in discussion forums, on Facebook pages and on blogs
- setting up a group on LinkedIn or a Facebook page
- setting up a community on Google Plus
- setting up a blog.

Recording progress

As mentioned above, there are *tools available* for managing the process of engagement and “keeping track” and it is sensible to at least keep a simple diary to know where you have been, what blogs or other sites you have visited and where you have joined a conversation.

Part of being engaged will also include having a clear company view on *how to respond to criticism* and generally how to handle the greater interactivity with customers and others, which will inevitably be less organized than in the days when “corporate communications” meant issuing media releases occasionally, having a phone number with a recorded voice and multiple options and maybe a “fill this in and we'll get back to you” form on your website. Ideally you will have a set of written guidelines along the lines suggested above.

Engagement can be messy. It can be challenging. But to repeat Brian Solis' warning, the corporate choice is “engage or die”.

8. Technology

The Forrester **POST** methodology for setting up social media strategy in an organization provides an [easy to remember acronym](#): People, Objectives, Strategy, Technology. I remember reading that Technology was not placed last in that list just to create an acronym, but because the Forrester view was that Technology was indeed the last consideration in terms of *order of priority*.

Before we can know which platforms or which social media tools to use, we need to resolve some other questions, crucially *who the people are with whom we want to connect and engage, and our objectives*.

To use an analogy from the offline world, if you have a plumbing problem at your house or office, you don't call the plumber and explain what tools to bring: you let the plumber work out the best tools to use once the plumber has diagnosed the problem.

There is a huge and growing number of social platforms and tools available.

A Facebook page might be ideal for some strategies and a non-productive time-sink for others, although given the vast number of people on Facebook I generally recommend to clients that they have *some* presence and engagement there. And for some companies in certain markets, say in the fashion or hospitality industries, an Instagram account might make a lot of sense, but not be useful for others.

Although not every expert will agree, my view is that every company should at least consider having a blog, not just a traditional, static website, as part of its presence on the social web.

There is also an international dimension. For example, if your company does business in China you would be wise to learn about [Renren](#) (formerly Xiaonei Network) – the “Facebook of China” – and [Baidu](#) and not assume that knowing about and being findable on Facebook or Google is enough.

But what would be a **good basic list of platforms** to consider for companies doing business exclusively or mainly in English-speaking countries such as the USA, Canada,

the UK, Australia and India?

A suggested starter list for consideration:

- LinkedIn
- Facebook page
- Twitter
- Google+
- YouTube channel
- Company blog

Some people are dismissive of Google+ but I believe that is at best a short-sighted attitude and I believe it is a smart move for companies to establish some degree of presence there, sooner rather than later.

Depending on your line of business and what your market research has revealed, you might also want to look at Instagram and Pinterest.

9. Evaluation

In the original version of this template the heading for this chapter was “Measurement”. If you do some basic searching online for topics such as “measurement of social media” you will find a lot of related debate, specifically about *whether you can measure ROI* (return on investment) for social media, and if so how. For those of us who live and breathe social media it's an interesting debate. I suspect that for most business people it would be as exciting as watching grass grow.

My view is that most or all aspects of social media in business can be measured in some way. But I also believe that for some aspects, especially for small businesses working in the B2B space, it can be difficult or in practice impossible, to have mathematical precision.

But so as not to get too bogged down in theoretical arguments about measurement, I prefer to focus on the term **evaluation**.⁵

evaluation

1755, from Fr. *évaluation*, from *évaluer* “to find the value (worth) of” *Online Etymological Dictionary*

In other words, assuming we want to know the **value** of a social media implementation, how do we go about that and what tools do we have available? Because with social media, as for any business activity, we **need to have a means of assessing the value of what we do**.

The most crucial aspect for evaluating our social media activity is to **know from the outset what our goals (or objectives) are**. If we don't know what we wanted to achieve, how will we assess the value of what we've done, except in the most haphazard way?

Obvious as that may be, it is not uncommon for businesses to have launched their social media engagement by focusing on one or other platform, say a blog or a Facebook page, without having first established clear goals.

⁵“evaluation” can also generate debate about what can be measured and what can't, but I see it as allowing a broader discussion

And the more *sensibly quantifiable* we can be in articulating our goals, the easier it should be to establish how close we have come to achieving them.

There are a number of free tools and services that can help here and there are others which require a financial investment.

Among the free tools are Google Analytics and Google Webmaster Tools, each of which provides amazingly detailed information on web traffic.

[HootSuite](#) and [Sprout Social](#) are both good and have 30 day free trials. HootSuite has a free version. They have different pricing models, but both are economical. And having used some of the more expensive, enterprise-level measurement and analytical software, I would suggest that even if you have an ample budget for that you don't let yourself and your firm be rushed into signing up for those straight away. Try out the more accessible ones like HootSuite and SproutSocial and then when you begin to see how they work and what they don't tell you as well as what they do, look at some of the higher end ones, such as [Radian 6](#) and [Sysomos](#).

An online search for terms such as *social media measurement tools comparison*, *social media monitoring tools review*, or *social media evaluation tools*, will produce a plethora of results, with many blog posts reviewing and comparing various tools and services.

Whatever tools we use, free or paid, we need to keep asking “what are we trying to achieve and what do we know from these results about how well or not so well we are doing?”

It is also important to observe the “unintended outcomes”. Often the data you get can tell you a quite different story from the one you have been telling yourself and others. For example, you may be marketing primarily to people in the USA and Canada and then find, by drilling down in your Google Analytics or other analytical tool, that a high proportion of your visitors are coming from, say, Europe.

What you do with that information will be up to you, but possibilities might include:

- re-working your site and its content to attract more people in the US and

Canada

- considering whether there is a potential demand for your product in Europe and what that could mean in terms of your product development and marketing
- writing a blog post to draw attention to the figures and asking your readers to share their views on how you should respond (this last option is perhaps a bit daring if you are new to social media, but could produce very valuable - and value-creating - suggestions)

One final note about evaluation

Don't expect results overnight. A common complaint I hear from other social media specialists is that many clients have quite unrealistic expectations about getting quantified results from social media engagement in a short period of time.

Love at first sight no doubt happens with customers, as in life generally, but a lot of long-term relationships take a while to build. Some of the value of social media engagement might take many months to manifest itself.

Feedback welcome

I would love it if you could take a moment to **email me and let me know whether this template has helped you**, or if you have any suggestions or recommendations about how it could be improved. Just send an email to coach@deswalsh.com.

Every good wish for your success and enjoyment with social media!

Des Walsh

PS: see next page for a quick, follow-up exercise

"If for no other reason than our customers are using social media, our presence there is demanded as well."

Paul Chaney, The Digital Handshake

A Quick, Follow-up Exercise

Remember those four questions at the beginning? Whether you do or not, here is a quick follow-up to help with your thoughts now about social media strategy.

- 1. What need does your company have now which social media could help you meet?*
- 2. How many hours a week do you think you will personally have to spend on it?*
- 3. How many hours a week will a staff member or members have to spend on it?*
- 4. What do you think can go wrong?*
- 5. What benefits can you see your company getting from a social media strategy?*
- 6. What questions do you still have or have not had answered to your satisfaction?*

Now, if you could take your answer to that last question, about the questions you might still have or not have adequate answers to, and send me an email - at coach@deswalsh.com - I will do my best to answer.

Next Steps

Now that you have been through this ebook you should have a good idea of what's involved, and whether you can handle the whole process yourself or with the help of people in your company.

Or you may feel that you could take **more effective action, more quickly**, with some expert external help, for example with one of my Social Media Coaching programs or by engaging me to help you develop a social media strategy. There are various possibilities. If you would like to have a no obligation, 30 minute conversation about that, just [**grab a time in my schedule here**](#) (click on the Social Media Discovery option) and let's talk.