

Measuring the impact and ROI of social media

Lee Hopkins and Anne Bartlett-Bragg

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Executive summary

THE DAYS of “*Will social media work for us?*”, “*How do we use it?*” and “*Who will do this for us?*” have gone. Today, any organisation that is client-centric, innovative and competitive considers social media as a part of core business strategy. Social media has become a business necessity. It is being used to communicate, to generate business, to recruit, and to network; it’s now ingrained in organisations as a fundamental part of all strategic initiatives.

But how can you tell if it is really working? You might have some people liking you on Facebook, or have a million people following you on Twitter, but are you tracking how effective each update is, or how far your tweets are reaching? What about mobile apps – they are easy to create but how does an organisation match the consumer use of apps to business objectives? And just *who* is responsible for managing the return on investment (ROI) of social media?

With a strategic focus, this report provides organisations at all stages of social media use with the tools needed to measure success in business terms, from the effective use of manpower/time, and benchmarking individual campaigns, through to performance metrics for each unique social media platform. The report will show that social media ROI is more than just saying, “We grew 1,000 fans this month”; it’s saying *why* it is important that we grew 1,000 fans, and what the business outcome is of such growth.

Chapter 1 explores the essential background to social media and explains why measuring and analysing social media metrics is so important to the success of any social media programme.

Chapter 2 helps the wise reader choose which business objectives of the organisation social media can help meet. Without understanding the importance of tying social media progress to real-world business objectives (financial and non-financial) any social media programme is destined to failure. The chapter examines in particular how social media can support objectives in sales, customer service, human resources, public relations and business intelligence.

Chapter 3 looks at how to set social media strategy now that business objectives have been identified. Two helpful approaches are outlined, in a workbook format, that will enable any organisation to identify the best path to follow, to ensure objectives are met and outcomes achieved. The chapter also includes a wide-ranging series of case studies that illustrate how organisations have deployed social media to support business goals.

Chapter 4 looks at which metrics should be tracked in order to determine the progress of the social media programme. An extensive list of possible measurements is supplied, by platform, but the emphasis is placed on each individual organisation assessing which metrics will be most appropriate to measure success against the stated business aims. Google Analytics and

sentiment analysis are discussed, and the FRY (frequency, reach, yield) approach to business metrics analysis is explored.

Chapter 5 addresses how to understand the capabilities of social media dashboards and align these to the identified social media objectives, which will be critical in the selection of appropriate software platforms. A case study is included to illustrate how dashboards have been implemented within an organisation and how valuable information is being gained that can be communicated to the business.

In Chapter 6, a review of using dashboards to report social media analysis is approached from a business or social intelligence perspective, progressing the use of analytics dashboards for measurement into reports that inform insight. That is, using the results to provide brand insight which can inform future product or service directions and how best to leverage social media activities to enable those directions. In addition, the role of a social media analyst is discussed and an interview with a current practitioner offers a view of the importance and future direction for this type of role in the organisational structure.

Chapter 7 considers the all-important issue of change management. Introducing a social media programme into an organisation will create change, and as we all know, change scares people, from the CEO down. Therefore, managing how the organisation and the executive approach social media, and managing their expectations of what a social media programme can deliver, is essential to the programme's success.

An afterword wraps up the report and offers suggestions as to where readers can go for further advice, guidance and knowledge.

Packed with practical tips and real-world insights, this report is essential reading for any organisation which wants to ensure that time and money spent on social media activities are reaping real business benefit.

About the authors

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Anne is currently in the final stages of completing her Phd which has explored adult learners' experiences of developing learning networks through self-publishing technologies such as weblogs.

Chapter 1: Assessing the power and impact of social media

By Lee Hopkins

“Just as the telephone, email and mobility could not be held at bay by companies reluctant to accept change, social media cannot be ignored either.”

Olivier Blanchard, Brandbuilder.com

SOCIAL Media did not just drop out of the sky; the social force you see before you grew from a tiny seed sowed in the 1990s. From humble beginnings with a very small community, social media has now grown to embrace the globe.

I could rattle off statistics here showing how big the social world has become, but that would be a waste of your time. No one these days is in any doubt that the social world is the pre-eminent, dominant force for social interaction in the western world. If you *are* in need of statistics, then please head to Socialnomics.net, the excellent website built by Erik Qualman. Qualman released a video in 2011 that neatly summed up the state of the social web at that time – you can find it and the background statistics at bit.ly/JoPqud.

Why has social media become so powerful?

In order to understand why social media has become such a pervasive force within commerce and general society, consider the way that companies have traditionally marketed their wares to consumers. Whether by radio, television, billboard or print, the

dialogue has always been one-way, the company pushing out the message and the consumer the passive recipient. The only power the consumer had was to either pay attention to or ignore the message being ‘shouted’ at them.

This type of marketing was called ‘interruption marketing’¹ by marketing guru Seth Godin: interrupting people whilst they read a newspaper or magazine, whilst they watched TV or listened to the radio, whilst they looked at the city or rural skyline.

It was easy to see why marketers were hooked on interruption marketing:

- It was easy. Create a few adverts, run them everywhere.
- It scaled. Need more sales? Run more ads.
- It was predictable. With some experience a marketer could tell how much additional revenue could be expected for every advert run.
- It fitted the ‘command and control’ culture of large organisations. It was totally controlled by the advertiser.
- It was profitable. Given the right product, it cost less to advertise than the profit that could be generated.

But the party, which lasted generations, couldn’t last forever. Respected digital brand strategist Olivier Blanchard puts it best:²

“After decades spent enduring thousands of daily marketing messages being shoved at

them across every communications channel known to man, the public found in the social web a means of turning the messaging off and turning instead to what mattered to them more: relationships, trust and conversations.”

Indeed, trust is one of the foundational pillars of the social world. Along with truth, transparency and accountability, it forms the four foundations of the online world – what I like to call the ‘Three Ts and an A’. Let’s examine them in closer detail.

Truth

If you consistently speak the truth in your conversations (be those conversations led by you or by your employees), then over time you will gain the trust of your conversational partners.

Of course, truth is a flexible beast, and there are limits to how much of the truth can be released at any given moment. But the inhabitants of the social media world are more likely to believe in your integrity, and thus believe in your words, when you open yourself up and say what is on your mind.

Naturally, you can stop short of ‘the whole truth’ if that truth includes ‘commercial in confidence’ material, or material sensitive to a third party, but the inhabitants of the social media world are no longer satisfied with companies who hide behind endless ‘we cannot tell you’ statements, and make their dissatisfaction known, sometimes to a very wide audience.

The secret to good social media relations is to engage with others as you would had you met them at a barbecue at a friend’s place. Meet them with patience, tolerance and honesty as much as you can and you will be rewarded accordingly. If they point out an area where your company could make improvements, acknowledge that

and gracefully ‘take it on the chin’; that improvement could be the one that cascades and helps your organisation to leapfrog to a new level. If you have the organisational power to enact that improvement, do it and let the person who suggested it (or people if more than one person suggests it) know that you have and what the outcome has been/is expected to be. If you don’t have the organisational power to enact the suggested improvement, make sure that the idea is forwarded to someone who does, and let those who made the suggestion know that you have forwarded the idea on. Ideally, you would let them know to whom you forwarded the suggestion, but that may be a step too far for the organisation in its early days of social media engagement.

Either way, if you can show that you have acted consistently over time to deliver the truth, as openly as you can whilst being mindful of commercial confidences, you will build up reputational trust in your audience. Break that trust and your digital reputation takes a beating; the bigger the break the bigger the beating.

Trust

despite mainstream press commentary to the contrary, the inhabitants of the social media world (that is, most of your organisation and most of the world outside of your organisation’s front door) don’t set out to be deliberately difficult and nasty.

People have a tendency to react to something (an event, a person, an organisation) in the same way that they are reacted to. Like meets like.

Therefore it makes sense to build a sense of trust into your conversations, a trust that everyone in the conversation will treat everyone else with respect.

As an organisation amongst cynical citizens, you must be first to trust in the

intentions and goodwill of others, even if you fear otherwise. In controversial situations and times, there will no doubt be some anger and angst expressed against the organisation, or against those who engage with the public or their employees via online channels, but the organisation should still engage from a position that trusts that the goodwill will return and that commonsense will prevail. Only ten per cent of the readership will comment, but the remaining 90 per cent will be watching very closely to see how you react, looking for signs that you are behaving like a good corporate citizen. Trust in their ability to influence their peers in ways that you cannot control, nor sometimes even witness.

Transparency

Much as there are limits to how much 'truth' you can deliver at any one time, so too there are sound reasons why an organisation might want to limit the amount of information it shares with its various stakeholders. Issues of legal disclosure, third party commercial sensitivity, strategic direction, *inter alia* mean there are sometimes conversations that have to be cut short at the 'sorry, but we cannot talk about this at the moment' stage.

However, online conversations in this new social media landscape should be conducted with as much transparency as possible.

Thus, employees who are engaging in conversations within the social media space should be named. For example, a Twitter account with the name XYZCorp should have, somewhere in the biography section, the real name of the employee managing that Twitter account. Or if there is a customer service team blog, the names of the bloggers should be given.

If your organisation is one that represents others you should always publicly

acknowledge that relationship. Thus, in your tweets, for example, when talking about something one of your clients has done, or you are asking them a question, preface or end your tweet with '[client]': "@rhasa_CEO [client]: What is the state of the housing market this month?"

If you are blogging or talking about a client or supplier in a video or podcast, make sure you let your audience know that you have a relationship with that named organisation or person.

Should you decide to hide these relationships, sooner or later they will become common knowledge (the internet, and social media in particular, is particularly good for finding out the stuff that some prefer remains hidden) and your or your organisation's digital reputation could take a beating as a result. It is better to be open and honest about these relationships from the outset, that way no one can accuse you of hiding something.

Accountability

Google has a long memory. Words and actions that you take today may come back to haunt you in six months' or six years' time.

Therefore, it makes sense, as has been discussed above, to be truthful, trusting and transparent whenever you engage in online conversation. But equally you hold yourself and your employees accountable for what you say, even if what you say changes over time.

The time has long gone when politicians and others could say, "you quoted me out of context." With the ubiquitous presence of digital capture technology comes the ability to find the entire context for oneself, so that the previous excuses no longer wash.

However, that doesn't mean that an organisation, or indeed a person, cannot change its mind over time. Naturally, as new events and information come to light,

as circumstances change and unfold, even deeply-held beliefs can be modified or turned 180 degrees. Organisations are no different from human beings in that regard.

Social media conversations should always be conducted in a human voice not a corporate one, between human beings who allow themselves and each other to change their minds. Therefore, as long as an organisation doesn't back away from a previously stated position but instead acknowledges it *and then* goes on to explain why the position has changed, including links to the information that shaped that change of position, then the organisation has nothing to fear.

That is not to say that the organisation will never be criticised. Of course it will; there will always be malcontents and the disappointed online – just as there are malcontents and the disappointed offline too – but their numbers and influence will be small.

As an example of accountability in practice, consider an employee who blogs on the company's behalf and has responded to a comment on a post, saying that they will look into the matter raised and get back to the commenter.

That employee is now accountable to do just that and should they fail to do so they should be questioned as to why they failed in their duty. Similarly, if the organisation (through one of its employees) says that it will pass on a particular piece of information to a relevant department (or, preferably, person) then the organisation is accountable to do so. Should it become known, later, that the organisation failed to do what it said it would, the organisation's digital trust reputation will take a hit.

Three Ts and an A: The outcome

As long as the organisation, and its employees who engage with social media

on its behalf, are truthful in their conversations, trusting of the goodwill and good intentions of those other conversationalists, transparent in the relationships they have with third parties and accountable for what they say and promise, the ethical organisation should have no fear of engaging in the social media landscape.

The Cluetrain Manifesto

As discussed under 'Accountability' above, the best conversations in the social world take place with a human voice, not the voice of corporate spokespeople or lawyers. That is not to say that lawyers and corporate spokespeople *cannot* speak in a human voice, but that historically theirs is a corporate, legalistic voice, the tone of which is anathema to the social world.

This shift in 'voice' was pointed to back in 2000 when four thinkers – Rick Levine, Christopher Locke, doc Searls and david Weinberger – wrote 95 theses about the new online communication landscape and how businesses should approach it. The theses, 95 short sentences or mini-paragraphs, outlined how business needed to change in response to the global and powerful nature of the internet.

They posted their theses up on a website – Cluetrain.com – and invited the world to comment and sign up to their manifesto. Thousands of people did, including not only individuals but corporate voices too. The website is famous for being the first website to be made into a book, *The Cluetrain Manifesto*.³ You can still visit the website to read the 95 theses, and you can buy the tenth-anniversary edition of the book that comes complete with additional thoughts and ideas about how businesses must change if they are to survive in the 21st century.

Here's a sample of the theses:

- "Markets consist of human beings, not demographic sectors."
- "Conversations among human beings *sound* human. They are conducted in a human voice."
- "Whether delivering information, opinions, perspectives, dissenting arguments or humorous asides, the human voice is typically open, natural, uncontrived."
- "People recognise each other as such from the sound of this voice."
- "The Internet is enabling conversations among human beings that were simply not possible in the era of mass media."
- "There are no secrets. The networked market knows more than companies do about their own products. And whether the news is good or bad, they tell everyone."
- "Corporations do not speak in the same voice as these new networked conversations. To their intended online audiences, companies sound hollow, flat, literally inhuman."
- "Companies that assume online markets are the same markets that used to watch their ads on television are kidding themselves."
- "Companies that don't realize their markets are now networked person-to-person, getting smarter as a result and deeply joined in conversation are missing their best opportunity."
- "Smart markets will find suppliers who speak their own language."
- "If you want us to talk to you, tell us something. Make it something interesting for a change."
- And the 'bumper sticker' version: "There's a new conversation between and among your market and your workers. It's making

them smarter and it's enabling them to discover their human voices... You have two choices. You can continue to lock yourself behind facile corporate words and happytalk brochures. Or you can join the conversation."

It's amazing how prescient those theses were.

Now that Facebook seemingly rules the online world, the need to engage with audiences in a human voice, not a corporate one, is more important than ever. I get asked many times at the workshops and seminars I run how a business can build an audience. The answer is simple: be interesting and interested. It's simple conversational etiquette: the more interested in others you are, the more they will come to see you as a friend, not a foe.

As Edward de Bono says in *How to be more interesting*:⁴

"It is what happens in your mind that makes you interesting. It is how you express what happens in your mind that makes you interesting. It is what you cause to happen in the mind of a listener that makes you interesting."

Find out about your audience's fears, their frustrations, their failures, their successes, their dreams, their day-to-day experience. The more you know the more you can tailor something to help them achieve more or solve their problems.

They'd be willing to pay you for that.

Why measure social media?

For many years there was a long-running debate amongst us commentators which ran along the lines of, "Should we even be strategising and measuring social media?"

The argument went something like this: since social media is (or should be) a

pervasive element within organisations, then measuring it as if it were a mere marketing tool is foolish, because it (social media) touches every element of a business; it is impossible to quantify every aspect of an organisation's activities, and some of the most profound activities, that produce significant results, are intangible and unquantifiable.

There is some truth and logic to this. But it is also a lazy way out of the argument, because as any business owner will tell you, what isn't measured rarely improves.

Similarly, regarding strategy, there was a view that since social media channels were so quick and inexpensive to set up, the 'strategy' as such should simply be, "throw it out there and see if it sticks." This may have been applicable in the early days of businesses exploring social media (circa 2004-06), but is certainly not applicable now. The dominance of Facebook, the power of YouTube and Twitter, all this and more demand that organisations approach these social channels with their faculties sharp and their senses attuned to the *zeitgeist*.

So in 2012 the savvy organisation recognises that it must think seriously about what resources it puts towards social media, and what those resources are to do.

Useful Social Media's 2012 report, 'The State of Corporate Social Media',⁵ gives some interesting insight into how seriously the business world is taking social media.

Corporate use of metrics seems still to be in its infancy. Web traffic is the predominant metric used as a key performance indicator (KPI), but that is frankly too simplistic a measure to be of any real value. The 'number of followers of social accounts' is a slightly more useful metric, but it is also near-irrelevant to say, "we grew our fans by 100,000 this month" when there is no tracking of what that increase in follower number

actually means from a business perspective (conversion to sales, for example). The third metric that respondents to the survey reported using was the most interesting: engagement. It's disappointing that it languishes down in third spot – after all this time I would have liked to see it at number one.

Of interest too are the metrics that practitioners would like to be using but aren't, the most popular being activity, increase in followers, conversion to sales, web traffic and conversion to leads. It is the conversion metrics that to my eye would yield the greatest benefit if used more.

But the respondents to the survey were also asked if the metrics they were currently using were up to the task and, unsurprisingly, nearly 80 per cent of the respondents reported dissatisfaction with the current metrics. It seems that there's a deep desire for more meaningful metrics to emerge for tracking social media impact.

Make no mistake, though, corporations are using social media to solve real-world business problems. Here are some statistics from the report:

- Ninety-three per cent of companies say social media is becoming a more important part of their marketing;
- Fifty-seven per cent of social media teams are part of the marketing department;
- Fifty-six per cent of companies are currently using social to deliver customer service;
- Seventy per cent of B2C companies will see a budget increase for social media in 2012;
- Seventy-six per cent of companies plan on using social for reputation monitoring this year; and
- Forty-one per cent of Europeans can link revenue to social media activity.

Clearly, corporations are taking social media seriously and measuring it accordingly; it's just that some of the metrics used are from the early days of the internet and there are better metrics around, if the organisation is committed enough to tracking all facets of its processes.

The RRISC model

I'm currently conducting research as part of a doctoral programme at the University of South Australia, and one of the findings to come out of my work has been an understanding of what social media is good at from an organisation's perspective.

The RRISC model helps an organisation to understand these benefits. RRISC stands for:

- Reputation;
- Rumours;
- Information;
- Story; and
- Customers.

What these elements mean can be seen in slightly more detail in Figure 1.

Social media allows organisations to manage and indeed bolster their online reputation.

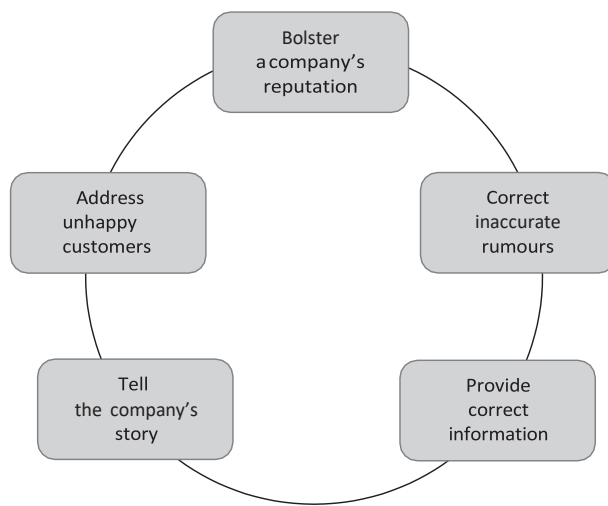


Figure 1: RRISC model of social interaction, © Hopkins & Magee, 2009

Social media also allows organisations to quickly correct any inaccurate rumours floating around, plus monitor keywords and brand names in real time for any mention that might be inaccurate.

An adjunct to the previous point, social media allows for the dissemination of correct information, as well as providing excellent ways of telling and helping spread the company's 'story'.

Finally, but equally importantly, social media allows an organisation access to previously unseen disgruntled customers, helping them transition from a disgruntled customer to an evangelist of the company or brand.

This helps explain why Useful Social Media found that three-quarters of their respondents were planning to use social media for reputation monitoring and management in 2012.

The RRISC model in practice

Let's see how each element of the RRISC model works in real life.

Firstly, an organisation can monitor the social web for mentions of itself, its employees, its industry and its competitors.

Then, where appropriate, it can leave comments on blog posts, videos and tweets that help bolster its online reputation (for friendliness, for great customer service, and so on).

Secondly, if inaccurate rumours are found the organisation can set the record straight, or at least put its own point of view across, preferably in a non-confrontational, friendly manner.

Thirdly, the internet is a known hive of incorrect information. Much nonsense exists, spouted by the well-intentioned but uninformed and the mischievous alike. The social web offers plenty of platforms where

misinformation can be corrected, where the facts as the organisation sees them can be laid out for all to see (and comment on).

The social web is unlike any media platform that has come before it; it offers everyone the opportunity to tell compelling stories and share points of view for next to no cost. An organisation can share its history, talk about its founders and the philosophies that still guide the organisation today; an organisation can create a video that shares the stories of its employees, or its products and services, and release that to the world for a fraction of the cost of a traditional mainstream TV advert or infomercial. It can host articles longer and more informative than can be published by mainstream media, and with links to still and video imagery and other support material. Every single piece of content it hosts can be shared and re-shared by its audience. Every organisation has a compelling, engaging story to tell about its history, its people, its future – social media offers powerful ways of telling that story for minimal cost and maximum reach.

Lastly, social media has proven itself invaluable as a customer service tool, allowing organisations to service customers faster and for less cost than traditional call centre-based operations. Erik Qualman of Socialnomics reports on one organisation that has calculated that running a forum where customers help each other costs 25 cents per 'issue', compared to \$12 per issue when handling that issue through a call centre. There is an additional, spin-off benefit to good customer service on the social web: there are a lot more eyeballs watching than the number actively participating in the conversation. Many people are watching to see how the organisation handles complaints and negative customer experiences; well-

handled customer service delights not only the immediate recipient but also a silent, watching crowd.

The negative social world

The RRISC model neatly encapsulates all of the benefits of using social media, but what of the risks? What can an organisation do if it finds itself the subject of negative commentary on the social web?

Thankfully, the United States Air Force, of all organisations, has provided us with a solution: a decision flowchart on how to handle negative commentary – see Figure 1.

The decision tree allows you to follow the correct response to any situation your organisation might find itself in online. It allows you to consider whether the post is 'friend' or 'foe', if the criticism is warranted or not, and what to do if you are 'trolled' – that is, if someone deliberately sets out to create mischief.

Sometimes the best thing to do with online idiots is to ignore them and not give their fire any oxygen of publicity. At other times it pays to engage with them and help correct their misinformation. The decision tree helps you decide which is best by considering such factors as the reach of that miscreant and whether their 'bombs' have created damage for others in the past.

It is strongly suggested that organisations create their own decision tree, based on their own culture and experiences, and keep a copy handy on everyone's desktop.

Summary

From humble beginnings, social media has grown to become a powerful, pervasive force. It upset the dominant model of interruption marketing and now finds power in an environment that cares more for respect, truth, trust, transparency, accountability and the requirement for conversations and

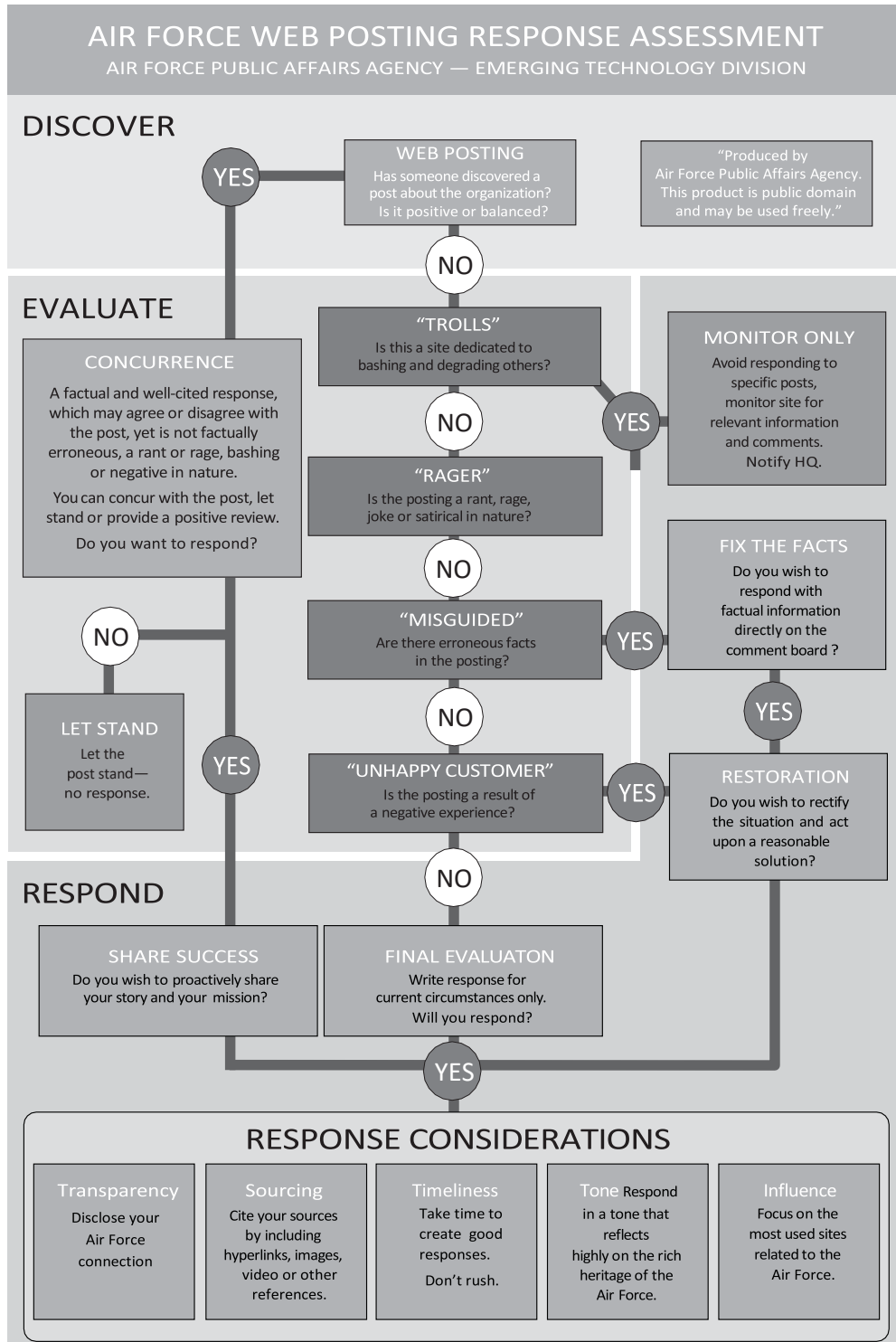


Figure 1: United States Air Force web posting response assessment, © Air Force Public Affairs Agency

relationships. *The Cluetrain Manifesto*, written in 2000, remains the premier resource that organisations can study for insights into how to effectively navigate this new social world, a world that allows organisations tremendous opportunities to bolster their reputations, correct inaccurate rumours, provide correct information, and tell their stories. There

are even resources available that help organisations navigate the minefield of unhappy customers and commentators.

But to properly consider the return on an organisation's investment into social media, we must now look at what the goals and objectives of the organisation are, and how social media works to meet them.

Case studies: Social media in action

Air France

Air France engages with the social world through three primary platforms: Facebook, YouTube and Twitter. As of July 2012, on Facebook it has around 845,000 fans on its primary page (it maintains three pages on Facebook); on YouTube it has around 1,200; and on Twitter it has just over 1,500 followers. It also maintains a presence on LinkedIn.

The primary Facebook page is put to good use as a customer relationship tool.

Functioning not only as a one-way resource output tool, it has also developed into a call centre and a problem solver. Air France runs competitions on the page, posts videos and airplane model information, presents unique offers and serves as a focus for Air France's online reservation system.

Air France provided a great example of how *not* to use social media, back in 2010 during the Iceland ash cloud period. The social media team went almost silent, refusing to respond to stranded and very concerned passengers. This caused a huge online backlash, particularly as it was pointed out that Air France's sister airline, KLM, kept its social media channels open during the same period and garnered much praise and goodwill for doing so.

This highlights two issues that corporations face with regard to social media: that a good online reputation can be easily lost; and that a unified approach to social media can be difficult to achieve, even in the same company.

- Air France on Facebook: facebook.com/airfrance
- Air France on Twitter: twitter.com/airfrance
- Air France on YouTube: youtube.com/airfranceonair

Citi

The financial corporate uses the big three of Facebook, Twitter and YouTube (plus a side-serve of the obligatory corporate network, LinkedIn) to engage with its online audiences. Interestingly, it also uses a blog extensively to share its news (using blogs as news sources is a great idea; the frequent updating of the blog often leads to excellent Google search results for the company). Financial institutions are slow to utilise social media in general, and to use a blog (and use it well, as Citi does) shows excellent social media leadership.

The YouTube channel is used extremely frequently to highlight Citi employees at work and the sorts of activities they are engaged in within the communities in which they work, reinforcing the 'New Citi' ethos of a human bank with a caring side.

Apparently there are over 100 Citi employees dedicated to the company's @AskCiti twitter account, reflecting a solid commitment by the company to social engagement channels.

- Citi on Facebook: facebook.com/citi
- Citi on Youtube: youtube.com/user/CITI/videos
- Citi on Twitter: twitter.com/askciti
- Citi on LinkedIn: linkedin.com/company/citi
- Citi blog: blog.citigroup.com/

Coca-Cola

Coca-Cola's social media strategy is often held up as a 'gold standard' at which to aim. From its excellent social media policy (which you can find at bit.ly/wS65wq) to the leading-edge design of its Facebook pages prior to the introduction of the Facebook Timeline, Coca-Cola has consistently used social media to engage with its audience.

It maintains several presences on Facebook, Twitter and YouTube, carving up its online presence to cater for different audiences. For example, there are Twitter accounts for the corporation (@CocaColaCo), the corporation's reach out to the general population (@CocaCola), an account for the World of Coca-Cola operation in Atlanta, USA (@WorldofCocaCola), @CocaColaMexico, @CocaColaRacing for the corporation's NASCAR activities, @CocaCola_de for Coca-Cola Germany, @CocaCola_es for the Spanish market, @CocaColaVe for Venezuela, @CocaColaZeroMx for Coke Zero in Mexico, @CocaCola_Br for Brazil, @CokeAmatilId for Coca-Cola Amatil in Indonesia as well as @CocaCola_Id, @CocaColaAr for Argentina... In fact there is a Twitter account for just about every product that Coca-Cola owns and every country that Coca-Cola operates in. There's even a company-run account for Doctor Pemberton, the inventor of Coke (@docPemberton).

A recent campaign, 'Expedition 206', chose three 'Happiness Ambassadors' to go to the 206 countries where Coke is sold and use social media to document their 'Happiness' findings. The ambassadors used Facebook, YouTube, Flickr, blogs and other social networking sites to display their work.

- Coca-Cola on Facebook: facebook.com/cocacola
- Coca-Cola on Twitter: see above
- Coca-Cola on YouTube: youtube.com/cocacola
- Coca-Cola on Flickr: flickr.com/groups/colastuff/

Chipotle

Chipotle is a North American restaurant chain that uses free-range foodstuff wherever possible to make its Mexican-inspired meals. Through the 'natural food' movement, Chipotle has grown in size and success from its one-store beginnings. It also has many competitors vying for customer dollars in that market space.

In order to differentiate itself from its competitors it decided to create a two-minute video that told its story (see 'The RRISC model' in this chapter) and released that video on TV during the 2012 Grammy Awards. It had also previously put the video on YouTube so that the social

world might more easily share it. According to advertising industry blog AdAge.com, the video upstaged some Grammy performances.

Here are some Twitter responses to the advert:

- @WilsonTech1 The Chipotle commercial is single-handedly the best part of the #Grammys so far.
- @poniewozik Coldplay-based Chipotle commercial > actual Coldplay performance. #grammys

So far the video has generated over six million views on YouTube and much publicity for the company, being shared on Facebook and StumbleUpon, amongst other social networks. You can watch the video at <http://youtu.be/aMfSGt6rHos>.

KONY 2012

Breaking through the clutter to reach your target audience is getting harder than ever. According to research by Time Warner and Innerscope Research (bit.ly/MU5ia3), today's 20-something touches 27 different media venues every non-working hour. That's a lot of 'channel surfing'. So expecting them to pay attention to a 30-second commercial is hard enough; getting them to pay attention to a five-minute movie is next to impossible. Or so you would think.

But as marketers are increasingly finding out, audiences that are unwilling to spend 30 seconds with you *are* willing to spend five, or even 30, minutes with you if what you are offering them is something compelling, interesting, valuable, entertaining, emotive and simply enjoyable – even if it's branded.

Millions around the world watched and shared the KONY 2012⁶ video, which even became the subject of TV specials (see bit.ly/M0cfs5). Over 90 million views of the video on YouTube attests to the power of long-form content if that content meets the demands of the social world's audience.

Nike

Nike has created a very successful long-form advert for its 'Fuelband' campaign. With over six million views so far, the video shows the travels of two men who embrace the campaign's spirit of #makeitcount. The video has generated significant amounts of interest around the social world, including much of the Northern Hemisphere, Africa, Australia/New Zealand and many countries in Latin America. You can view the video at <http://youtu.be/WxfZkMm3wgc>.

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6. See <http://www.kony2012.com/>.

Chapter 2: Linking social media to business objectives

By Lee Hopkins

THIS BEING the digital age, there is no shortage of activities one can track. Visits to a web page, unique visitors to a website, time spent on a page, number of 'likes' or followers... anything that happens in the digital world can be tracked, measured and recorded.

But so what? What is the point of all that tracking and measuring? If you explained to the CEO or CFO that your website's bounce rate had dropped 2.4 per cent, would they understand? Would they care? The chances are very good that they would neither understand nor care.

Even educating them so that they know what a bounce rate is and why it's important is irrelevant. Irrelevant simply because there are no *business outcomes* tied to your bounce rate or Twitter followers. If there's no business outcome, there will be no glint of interest in your CEO's or CFO's eyes.

You see, your numbers must *mean* something, they must speak to the CEO in the language that he or she understands. That language is the language of 'business', a subset of the dominant language, spoken and understood by those whose job it is to safeguard and grow the company's wealth. The speakers of this subset dialect don't care for any numbers unless those numbers are tied to the goals of the business; therefore, if you want to get time in front of your CEO, make sure that your numbers are tied to the objectives of the business.

Those objectives come in two flavours: financial and non-financial. Financial objectives might be sales or costs; non-financial objectives might be staff hiring or turnover, market share, sentiment or reputation. Any number you present must be presented in light of a business objective.

For example, an objective of the company might be to reduce staff turnover (because of the cost of rehiring, lost productivity and impact on the company culture). The responsibility of the social media director or programme manager is to show how the organisation's social media initiatives positively affect (or even negatively affect) staff turnover. Saying that the intranet's social network has grown by 500 members in the last month is not enough; showing how that growth has impacted on staff turnover is what is required.

Similarly, stating that you have grown your organisation's Twitter 'followers' number by 1,000 means nothing; showing how that growth has positively impacted on the company's reputation or public sentiment means everything.

As Olivier Blanchard says:¹

"Social media activity, in and of itself, is not an objective. Acquiring net new customers, increasing reach, building loyalty, capturing more market share, even increasing net new revenue—*these* are objectives."

So what sort of objectives are relevant and can be impacted by social media?

Let's answer that question by considering what business functions can most easily be enhanced by a social media programme. There are, I believe, five areas of any business that lend themselves most agreeably to social media: sales, customer service, human resources (HR), public relations (PR) and business intelligence.

We'll consider each one separately.

Sales

At the risk of annoying other managers, sales is the key element of any organisation (in the for-profit world; the not-for-profit world is naturally different). Without sales the organisation ceases to exist; the CEO doesn't get paid, managers don't get paid, employees don't get paid. It is the rare organisation where the CEO forgoes payment. Without sales bringing in money the whole operation grinds to a halt.

Social media can and does help drive sales revenue. Yes, there are social media purists who espouse the line that social media is purely about conversations and engagement, and that money taints the relationship between company and customer, but in reality customers are very happy to pay money, and talk about it, if they have their headache taken away.

Yes it's true, *how* you talk about money, *how* you introduce it into the conversation, can leave a bad taste in the mouth, but in and of itself 'money' is not a subject to be shy of. Sales and good social media should not exist at polar opposites of the conversational spectrum.

But how can social media help drive sales? For starters, social media can help an organisation acquire new customers – first through reach and then through influence.

As a Hubspot report on social media says,² "64% of users are more likely to

purchase from businesses that answer their questions on Twitter."

Acquiring net new customers and developing them via social engagement are two very obvious ways that social media can help an organisation achieve business objectives.

In addition, social media can help increase the frequency of customer transactions and increase the amount of money they spend in each transaction (average value per transaction).

Social media can also increase the reach of existing and new marketing campaigns. Think back to five years ago; back then, if you wanted to launch a new product you did so via any or all of the following: TV, print, radio, billboards, events, dealer incentives, point of sale material and trade reviews.

But now you can repurpose that TV ad on YouTube and Facebook. You can leave support material on your blog, your company website, your Facebook page. You can set up a branded Facebook page just for the promotion, with photos and video from trade events, customer engagement evenings, and so on. You can take enticing still photos and post them on your Pinterest page for others to pin to their boards and share.

You can now make your content 'stickier' than before by virtue of the technology surrounding it – customers and prospects can engage with it, play with it, replay it, review it and at all times connect directly with someone from the company who can assist them in their purchasing decisions.

You can even use social media to send out discount messages – "20 per cent off today only; use the following code." Zappos has been doing this for ages to sell shoes; dell has also been doing this to great effect – US\$6.5m in sales directly attributable to Twitter.

Let's look at how such activity can be written up in CFO and CEO-friendly language.

Case study: Increasing sales at Joie de Vivre hotels

Joie de Vivre, a company that operates 33 luxury hotels in California, is using a variety of social media platforms to drive sales and marketing for its properties. Central to the hotel group's strategy is disseminating deals and coupons to followers and fans on Facebook and Twitter.

Every Tuesday, Joie de Vivre's Twitter account (@jdvhotels) will tweet an exclusive deal to its over 14,000 followers, and those followers have only hours to book the steeply discounted room rate. For example, recently it offered \$79 rooms at the group's Galleria Park Hotel in San Francisco, rooms that normally go for \$180. The company also operates similar deals for its 10,000-plus Facebook fans (facebook.com/jdvhotels) on Fridays ('Twitter Tuesday' and 'Facebook Friday' – clever and easily remembered).

In less than a year, Joie de Vivre has booked over 1,000 room nights through these types of deals – rooms that otherwise would have stayed empty.

Objective: Increase sales.

Target: [fill in with the amount you want to achieve]

Strategy: Acquire net new customers by turning followers into transacting customers, further develop existing transacting customers into repeat/loyal customers and leverage followers to increase reach.

Tactics: Promote special offers on Twitter and Facebook; answer questions from customers and prospective customers on Twitter and Facebook; provide additional resources for our followers to spread our message via word-of-mouth, retweets, etc.

Customer service

Social media brings all of the conversations and mentions of your brand out in the open, which also makes them trackable and quantifiable. This 'openness' makes it easy for organisations to keep an eye on what is being said about them, and also easy to enter into those conversations to assist, advise, correct where necessary and inform.

It also gives organisations a hitherto unprecedented opportunity to provide *real* customer service and answer a customer's query within seconds, rather than having them jump through innumerable hoops and

telephone prompts. Social media allows an organisation to service its customers at a much faster rate (real-time) with very little if any additional cost.

The benefits of social media-led customer service include:

- Constant real-time feedback from customers, users and the general public.
- The ability to react and respond in real-time, not making the customer wait.
- Faster resolution than through other means (for example, e-mail and telephone).
- Because of the faster call-resolution times, even a ten per cent reduction of load to the call centre can result in significant savings.
- Your customer service is on display for all to see. For every one person who interacts with you, there are 90 people who are watching to see how you handle customer interactions. Handle things well and your company's reputation increases.
- The best part of all: happier customers. Not being forced to spend an hour on the phone waiting in 'call centre hell', nor having to follow a seemingly-endless chain of "Press 3, press 2, press 6" demands, means your customers feel a

lot better disposed towards you than they do your competitors who still insist their customers jump through endless hoops to speak to a real person.

Let's look at how social media's impact on customer service can be written up in CFO and CEO-friendly language.

Objective: Increase customer satisfaction.

Target: [fill in with the improvement you want to achieve]

Strategy: develop new ways of engaging with customers and helping them to solve their problems.

Tactics: Use social media channels to quickly answer customer questions; reduce the load on the call centre by raising our profile on social media channels and reaching out to customers where they are.

How you go about monitoring the social space and responding to mentions of your brand is up to you; this report goes into more detail about monitoring dashboards in Chapters 5 and 6, looking at the simple and inexpensive to the industrial-strength and very expensive commitments you can make and the information you receive. But something you definitely do not want to get wrong is the type of staff you hire and train to run your online customer service operations.

You do *not* want to hire social media 'experts' to handle your customer service operations. What you *do* need is experienced customer service professionals with a good grasp of the social media environment. Not all social media experts can be trained to be good customer service folk, but every good customer service person can be trained to run a social media

Case study: Improving customer service at Dell

Dell has taken social media very seriously since 2006 and the company now has a holistic approach to it, putting employees through a 'social media university' in order to further their understanding of how social media is an essential element in customer relations.

Richard Binhammer, a director of executive outreach communication programmes at Dell, explained to me in personal correspondence that social outreach services (such as the Twitter account @dellcares) have a 98 per cent resolution rate and in 34 per cent of the situations where they are involved, someone who was upset with Dell not only thanked @dellcares for the help but shared with their friends how helpful @dellcares was to them (showing a conversion of negative to positive sentiment).

Binhammer has presented at many conferences,³ outlining and explaining how Dell understands the social media world and the insights it has gained. One such insight is that social media-based support improves sentiment and correlates with higher revenue. Another insight is that there is an established causality between social media activity and purchase.

Other insights include:

- Social media keeps customers engaged, provides solutions and improves loyalty;
- Social media activity has improved Dell's reach and share of voice; and
- Social media activity contributes positively to demand generation.

Overall, Dell sees social media as delivering value across the complete customer lifecycle.

account. Don't get the two mixed up in your hiring decisions.

And speaking of hiring...

Human resources

Social media makes the life of the HR professional easier. After all, which makes more sense – sifting and sorting through hundreds of near-identical vanilla résumés when looking to fill a position, or searching for your ideal candidate on LinkedIn, where the best candidates will have recommendations on their profiles by satisfied clients, peers and former employers?

Social media also makes it possible to monitor employees to see what they get up to online. Yes, Facebook and Google+ are two social networks that allow the account holder to limit the amount and type of information that is publicly shared, but most people are not over-zealous when it comes to personal information privacy and so let loose in the public domain all manner of information, thoughts and ideas that might sometimes be better kept to themselves.

This gives the HR professional ample opportunity to check that the organisation's social media policy is being adhered to outside of the company's walls, including that section of the policy that asks employees to be transparent about their employment when discussing the company, its products or its people.

Without a doubt the number one tool for the HR professional is LinkedIn. Not only can an HR professional search amongst the rapidly enlarging pool of contacts (161 million in March 2012 and growing by two new members per second) for specific experience and qualifications, but the time saved can be incredible.

As Mike McDonough, the President of General Search & Recruitment, is quoted

on Facebook as saying, "7 InMails, 5 responses, 1 hire, 30 minutes."

One can also gain more information from a candidate's LinkedIn profile than can be elicited from a mere résumé. LinkedIn allows candidates to pull in their blog feed, show their latest slideshow presentations (with audio) via Slideshare, display their latest tweets. One can see their travel itineraries, find out their favourite books and more. Just as importantly, you can see who that candidate is acquainted with; sometimes who they are friends with can speak volumes about them.

Because LinkedIn, Twitter and Facebook are all part of the social universe, discussions you have on one network can spill over onto LinkedIn, or vice versa. A discussion about, say, internal communications on Twitter generates some good conversation, including some new names that you don't recognise but whose contributions you valued. A quick search on LinkedIn and a request to 'connect' finds your personal network increasing in size due to interactions made on another, completely separate network.

Twitter and Facebook aren't just tools that feed into LinkedIn, either; discussions that take place within the various groups on LinkedIn (there is at least one group for every possible business topic of conversation, procedure or process, department and area) can spill over onto Facebook and Twitter, expanding one's personal networks there, too.

It is simplicity itself to find a potential employee, look at their recommendations, contact those referees (with the appropriate permissions) and double-check the potential employee. At the same time, the HR professional's personal network grows, by adding those referees to one's own network. It is equally simple to see if those potential employees have contributed to discussions

in the various groups on LinkedIn, adding yet further nuanced information about them. Equally, the HR professional can use any of their own personal networks, not just LinkedIn, to ask for referrals and recommendations of suitable candidates.

These sorts of searches, these sort of discussions, were almost impossible to have before social media. What social media has done is allow for massive scaling of recruitment activity – the ability to contact hundreds of referees, hundreds of niche candidates, saving thousands of hours.

Let’s look at how such activity can be written up in CFO and CEO-friendly language.

Objective: Increase retention rate and reduce staff turnover costs.

Target: [fill in with what you want to achieve]

Strategy: Hire better employees who are more closely aligned with our company’s culture.

Tactics: Use LinkedIn, Facebook and Twitter

to cross-promote our vacancies, plus seek out skilled candidates on LinkedIn and invite personal recommendations.

Public relations

There are those who believe PR is the natural home of an organisation’s social media initiatives, so immediate and powerful is the impact of social media on a company’s perception, reputation and goodwill.

The RRISC model discussed in Chapter 1 rests squarely on the shoulders of a PR professional: a PR professional is charged with bolstering a company’s reputation, correcting inaccurate rumours, providing correct information, telling the company’s story and – in collaboration with customer service – addressing unhappy customers.

A classic example of how all of these factors were addressed, successfully, came about during the global financial crisis of early 2009, when Ford Motors found itself caught up in the auto industry bailout in

Case study: Staff engagement with Dell EmployeeStorm

dell has an internal version of its very popular crowdsourcing engine, IdeaStorm (see ideastorm.com). The idea behind EmployeeStorm is to let employees make suggestions about process improvements and product ideas. Employees then vote for the ideas presented; the more votes an idea gets, the more chance it has of being implemented. Introduced in 2008, within two years it had captured over 3,000 ideas, which in turn had received over 45,000 votes and seen over 200 ideas implemented.

As Hewitt Associates’ report into engaged employees⁴ stated, businesses with engaged employees reported:

- Recruitment costs down 55 per cent;
- Turnover down 40-50 percent;
- Growth in employee productivity;
- Higher profitability;
- US\$18,600 more market value per employee;
- Higher customer loyalty;
- US\$3,800 more profits per employee; and
- Additional US\$80-120,000 revenue per month.

Case study: Engaging the community with Pinterest at the City of Salisbury

Local government body the City of Salisbury (located in South Australia) recently joined social network Pinterest in order to further its reach.

With pinboards like ‘The finer points of Capital Expenditure’ (“The City of Salisbury Capital Works team do a lot of work in the community from kerb repairs to street tree replacement. These photos are close-ups of their work. The picture are embeded [sic] with a link to our current Capital Works in the City of Salisbury web page”) and ‘St. Kilda playground – stories’ (photos of children playing in the adventure playground the council built), the council is aiming to promote itself to a wider audience than would normally find it through traditional search technology. Other pinboards include:

- A day in the life of your council;
- Recreation in Salisbury;
- Your libraries;
- Living legends;
- Salisbury for women;
- Salisbury for men;
- Your staff, your community;
- Engaging the community past and present;
- City of Salisbury tennis; and
- We like what you’re doing.

You can see the City of Salisbury’s various pins at pinterest.com/cityofsalisbury

the United States. Even though Ford *hadn’t* been bailed out, public perception was that it had. The head of Ford’s social media practice, Scott Monty, spent countless hours on all social media channels clearing up the confusion. He responded, he corrected, he informed, he told Ford’s no-bailout story and he addressed an unhappy public.

So successful was he at this that Ford was featured in a very popular YouTube video by Erik Qualman, stating very clearly that not only had Ford not received any bailout, but that 25 per cent of Ford’s marketing budget was spent on social media channels (Qualman drew the conclusion that the reason for Ford’s lack of need to be bailed out was because it understood that the social world was the new, more powerful home of advertising

and marketing). You can see the video at bit.ly/JoPqud.

By allowing for deep engagement with customers, prospects and fans of the company, social media can help a PR team increase mindshare and trust (something that is nearly always lacking and could be improved – see Edelman’s Trust Barometer for further guidance on this at <http://trust.edelman.com/>).

PR teams have the opportunity to use social media to build higher degrees of positive sentiment and greater alignment of values between the organisation and its wider publics.

Business intelligence

Social media allows the organisation to know what people are saying about it, what aspects of its products customers like and dislike. Is that not valuable?

Social media allows the organisation to track public sentiment over time, to see whether the company's reputation and trust scores are growing or shrinking. Is that not valuable?

Social analytics allows the organisation to track and measure every aspect of its life online, from how long people stayed on its product review pages on its website, to who the evangelists were who promoted the company and its products the most to the widest, narrowest and most likely-to-spend audiences. Is that not valuable?

And all it takes is someone, or a team, prepared to listen; listen to what is being said

about them, and track what is being said by whom and when. They don't even need to join in the conversations if they don't want to (and I recommend that at first they don't).

It is only by listening and understanding what is being said, why it is being said and when it is being said that organisations can build up accurate knowledge of customer preferences, gripes and loves. By addressing the gripes and building on the preferences and loves, an organisation can leapfrog competitors who aren't yet tapping into the power of social media, or who are merely dipping their toes in the water but not approaching social media strategically.

Case study: Dachis Group and social business intelligence

Lee Bryant is the European managing director of leading social media consultancy Dachis Group. At a summit the group ran in London in 2011 on social business intelligence, Bryant pointed out that social monitoring (as a business intelligence tool) allowed for real-time insight not just aggregate buzz. He also said that it exposed more staff to customer feedback, encouraged ownership and action by all, and that it made the whole company – not just the marketing department – more customer-centric. His conclusion was that social business intelligence helps organisations evolve.

Also from the Dachis Group is Dion Hinchcliffe. Hinchcliffe recently posted on the group's blog a terrific graphic showing a strategic view of business intelligence (available at bit.ly/LdvdGF).

He also addressed the sometimes confusing sister term, *social analytics*: "Where *social analytics* is about the measurement and data mining of the social universe for any reason, *social business intelligence* is concerned with a more holistic process aimed at specific business outcomes."

To Hinchcliffe, social business intelligence is "the discipline of monitoring the whole of the social media world while continuously deriving insight from the aspects of it that matter to you, strategically or tactically, depending on your needs. I say *aspects* instead of *conversations*, because while analytics will give us useful metrics, it's only until we apply the lens of business intelligence to the data itself can we clearly see the deeper and larger scale implications for our businesses."

For Hinchcliffe, these are the drivers of social business intelligence, in his words:

- "Marketing Optimization. Marketing has long been an early adopter of social media, and it's no different with social business intelligence. Now instead of reports and dashboards that merely show the *what*, marketers can find out the *why*. With social business intelligence, companies can craft much more detailed yet fully integrated qualitative pictures of the

inbound funnel, identify why engagement strategies are working or not, and organize systematic, yet mass-customized responses in scale.

- **Capturing Ideas and Unmet Needs.** Going beyond the trend analysis of analytics allows the processing and isolation of the deeper implications of social media activity. Social business intelligence can capture innovation, new ideas from the marketplace, identify customer wants and desires, and identify the gaps in your organization's services.
- **Situational Awareness.** Identifying and tracking the top trends, understanding when critical situations arise to protect customer experience or brand, and much more. Going well beyond low-level analytics, social business intelligence can help make sense of more data than any manual or raw analytic process ever could.
- **Customer Care Opportunities.** Fully empowering Social CRM, social business intelligence can augment the interaction with customers in social media by improving the triage, prioritization, and resolution process of customer care.
- **Sentiment Analysis.** While social analytics can provide some basic insight into a customer's state of mind, only more sophisticated methods can semantically process and assess the actual meaning of the social media conversations involving your company or its products in order to derive actionable insight."

Products like Radian6, Kontagent and SAS Social Media Analytics are just three examples of social analytics tools that also provide some level of deeper social business intelligence features. In many people's opinions, it's virtually certain that social business intelligence will become a vital component of the way that companies derive bottom-line benefits from social media, including revenue growth, innovation, cost reduction, and more successful line-of-business operations.

Case study: Customer engagement at Neiman Marcus

US-based luxury retail chain Neiman Marcus started using social media for marketing, loss prevention and customer care back in 2009. Whilst it hasn't released business outcome specifics, Wanda Gierhart, chief marketing officer for Neiman Marcus Group, has stated that its online social activities have helped it accumulate nearly 500,000 Facebook fans and 50,000 Twitter followers.⁵

Social media has been an important aspect of Neiman Marcus's customer engagement and marketing strategies. "We want to communicate with our customer by any means she wants to use," said Gierhart. "Foursquare has over 15 million global users so it is clearly a platform that we want to learn to use well."

Neiman Marcus has been particularly active using location-based services to power awareness campaigns based around scavenger hunts, the benefits of which, Gierhart said, is that they push the customer to explore new departments within the store. "Often customers will shop only in one department or come in the same entrance each time they visit," she said. "[A scavenger hunt] creates an opportunity for them to see what all Neiman Marcus has to offer."

In October 2011, the retailer incentivised customers during a fall shoe and handbag event to check into the store using Foursquare by offering a free handbag. "When customers checked

into a store via Foursquare they were notified whether the location featured a hidden Nancy Gonzalez clutch, and were provided with a clue on how to find it,” Gierhart said.

In March 2012 Neiman Marcus hosted its second in-store Foursquare challenge in which customers who checked into store locations could win a Manolo Blahnik coffee table book.

“We wanted to engage those customers who are growing increasingly comfortable with using online media in many different ways as well as new customers who might be socially active on sites like Foursquare, but had not come into Neiman Marcus before,” Gierhart said. She added that while the first Foursquare competition took place in 15 stores, the second one was significantly bigger – taking place in all 42 locations.

Using analytics provided by Attensity and Radian6, Neiman Marcus has been able to drill down into customer sentiment to find out what really irks and garners praise.

Conclusion

If the above five areas are the most obvious benefactors of social media activity, what sort of business objectives can be positively impacted by social media?

Here are some ideas, to which you can add your own:

- Market research;
- Real-time insight into consumer preferences;
- Real-time insight into public perceptions;
- Crisis monitoring and response;
- Marketing reach;
- Marketing effectiveness;
- Reducing customer service costs;
- Reducing staff turnover/hiring costs;
- Improving customer service outcomes;
- Increasing sales;
- Humanising the organisation/brand;
- Image management – both general and in particular markets;
- Bolstering reputation;
- Correcting inaccurate rumours;
- Providing correct information;
- Telling the company’s story;
- Helping reverse negative impressions of the organisation;

- Moving into new, more technologically-savvy markets;
- Modernising communication channels; and
- Improving customer relations.

All of these objectives and more can be positively influenced by social media. So the next time someone asks, “What is the point of our social media activity?” you have a few weapons to fire back at them. Politely, of course.

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Chapter 3: Setting a social media strategy to achieve business objectives

By Lee Hopkins

NOW THAT your business objectives have been identified, it's time to examine what your social media strategy should look like in order to impact on those objectives.

'Strategy' is a word oft misunderstood in the business world, and it often appears in a sentence when the more correct word would be 'tactic'. Johnson and Scholes, in their textbook *Exploring Corporate Strategy*¹, define strategy as follows:

"Strategy is the direction and scope of an organisation over the long-term: which achieves advantage for the organisation through its configuration of resources within a challenging environment, to meet the needs of markets and to fulfill stakeholder expectations."

An easier way of understanding the term is to consider an example.

Let's say our business objective is to acquire new customers. The current *strategy* to acquire new customers is to use Facebook to increase not only our reach but also our prospect-to-customer conversions. The *tactics* we will use are, first, to provide discount coupon codes on our Facebook page for a customer's first online purchase with us, and second, to offer a \$10 discount to anyone who

shares one of our Facebook and Twitter offers this month.

Referring back to the previous chapter, the objective might be to increase customer satisfaction by the target amount. The strategy is to develop new ways of engaging with customers and helping them to solve their problems; the tactics to achieve this include using social media channels to quickly answer customer questions, whilst reducing the load on the call centre by raising our profile on social media channels and reaching out to customers where they are.

Before you start formulating a strategy

Before an organisation starts to create a social media strategy, it helps to know why you are entering into a social media solution in the first place.

With that in mind, I have developed two different tools to help any organisation understand its own culture and foundations, the understanding of which helps guide strategy formulation and execution. One I call the 'Five Ws and an H'; the other, the 'Five Pillars' approach.

Five Ws and an H – A workbook

It is imperative that strategic thinking be applied to any organisation's social media activity. The Five Ws and an H takes the form of a workbook. Please take the time to answer all of the questions, starting overleaf.

<p>The first 'W': Who? Before you can consider which tool to use, you need to consider the 'Who' questions</p>	<p>Write your answers here</p>
<p>Who are you aiming to converse with?</p>	
<p>Who will be responsible for managing this initiative?</p>	
<p>Who will speak on behalf of the organisation? (You may, for example, want to consider letting key suppliers or customers also engage with your conversational audience.)</p>	
<p>Will all employees have the ability to outreach, or just specific subsets (for example, customer service staff, marketing, sales, public relations)?</p>	

<p>The second 'W': What? Consider the answers to the following questions</p>	<p>Write your answers here</p>
<p>What outcomes are you looking for?</p>	
<p>What expectations do you have? (Include hidden expectations, which may not be uncovered easily – think about what you personally stand to gain from the success or otherwise of this social media initiative.)</p>	
<p>What are the risks involved with this project?</p>	
<p>What are the rewards?</p>	
<p>What are the obstacles to success?</p>	
<p>What can you do to mitigate them?</p>	
<p>What resources are you going to need?</p>	

The third 'W': When? Think through the answers to the following questions	Write your answers here
When are you planning to launch your initiative?	
When will you know you have been successful?	

<p>The fourth 'W': Where? Take time to understand the implications of your answers to the following questions</p>	<p>Write your answers here</p>
<p>Where will you launch this initiative (on what social platform)?</p>	
<p>Where will you launch the next initiative (perhaps the next phase of this current initiative)?</p>	
<p>Where will you launch the third initiative?</p>	
<p>Where are you going to get the resources to manage the conversations that ensue?</p>	

<p>The fifth 'W': Why? Tie back the answers to these questions to your organisation's overall business strategy</p>	<p>Write your answers here</p>
<p>Why are you considering using social media?</p>	
<p>Why even build a 'social media strategy' – why not just 'dive in'?</p>	
<p>Come up with one brief statement that captures the 'why' of your social media strategy. For example:</p> <ul style="list-style-type: none"> ■ Increase brand awareness, personalise the brand ■ Collaborate with stakeholders, gain insight, co-create products ■ decrease the cost of hiring ■ Optimise website, better search results, more traffic ■ Establish organisation as thought leaders ■ Educate stakeholders ■ Increase donations ■ Increase educational opportunities 	

<p>The 'H': How? Only after you have answered the five 'W' questions should you then look at the 'How' question</p>	<p>Write your answers here</p>
<p>How to connect – have you thought about which tools to use? (For example, Twitter, Yammer, Facebook, LinkedIn, Foursquare, blogs, podcasts, vidcasts, wikis... plus there are issues around the technology accessing the platform – more and more traffic is coming from smartphones and the trend is rising.)</p>	

The Five Pillars approach

There is another way of looking at social media strategy – the Five Pillars approach. While asking the organisation similar

questions to those above, the approach asks practitioners theme-based questions around the five Ps of policy, process, people, performance and price.

<p>Policy Social media policy: your employees are using social media, your company is probably being talked about via social media – what happens when the two collide?</p> <p>do you have a social media policy in place?</p> <p>If 'Yes', have all of your employees read and understood it? How do you know?</p> <p>If 'No', what are you going to do about that?</p>	<p>Write your answers here</p>
<p>Process Who is responsible for moderating the conversations?</p> <p>What systems need to be put in place for these conversations to happen?</p> <p>What will happen if someone says something negative?</p>	

<p>People Who are the foundation team members responsible for getting your first initiative up and running (not just the members of the social media team; think IT, HR, legal etc.)?</p> <p>Who will be responsible for ensuring the systems stay available 24/7?</p> <p>Will the people involved be from inside and/or outside of the organisation's firewall and front door?</p> <p>What are the implications of having 'outsiders' as part of the team?</p> <p>Are the C-suite (CEO, CFO, CMO, CIO, etc.) willing to be actively involved?</p>	<p>Write your answers here</p>
<p>People 2 What types of stakeholders exist?</p> <p>What are they looking for? Where do they go?</p> <p>How do they like to interact?</p> <p>How much time do they have?</p> <p>How willing are they to share openly?</p> <p>do they want to play a role in furthering the organisation's activities?</p>	

<p>Performance Aka 'measurement'.</p> <p>What measurement yardsticks/KPIs will you put in place so that you know when you are successful?</p> <p>What will you do to celebrate success?</p> <p>What will you do if KPIs are not being met?</p> <p>Will you celebrate milestones along the way to the annual KPI assessment?</p>	<p>Write your answers here</p>
<p>Price What price are you willing to pay for social media success?</p> <p>Are you aware of the risks?</p> <p>What do you see are the rewards?</p>	

A social media strategy formula

Now that the groundwork has been done and the all-important foundational questions have been answered, the actual strategy itself can be constructed.

Each strategy is different; no two strategies, even for the same organisation, are the same. Certainly no two organisations will ever have the same strategy, because the variables (audience, resources, time lines, and so on) are always going to be different.

Therefore, it is impossible to write one simple strategy that fits all social media situations. Instead, what can be created is

a further series of questions, out of which will arise the strategy that will drive the organisation's social media activity forward.

As with the 'Five Ws and an H' and 'Five Pillars' approaches before, these questions have been drafted as a workbook, allowing the committed social media team the space to write their answers down and review them in one central place.

To help the committed social media teams, all three worksheets are available as PDFs from my website at leehopkins.com/ark – please feel free to download, print off and complete.

<p>1. What business goal are you approaching?</p>	<p>Write your answers here</p>
<p>2. What outcome are you looking to achieve? (Be SMART – specify your answer in a way that is specific, measurable, achievable, relevant and time-based.)</p>	

<p>3. How will you know you have achieved your goal?</p>	<p>Write your answers here</p>
<p>4. What tactics are you going to use? (For example, which social media channel(s)?)</p>	

<p>5. What measurement method(s) will you use to track your progress?</p>	<p>Write your answers here</p>
<p>6. How will you report your progress to senior management?</p>	

7. What resources are required for you to achieve your outcome? What resources are actually available? What will you do to compensate for any shortfall?

Write your answers here

<p>8. What obstacles do you envisage?</p>	<p>Write your answers here</p>
<p>9. What can you do to overcome them?</p>	

<p>10. How will you celebrate your team's success?</p>	<p>Write your answers here</p>
<p>11. What other factors, if any, do you think you need to take into account?</p>	

Creating a social media strategy document

Your strategy document can best be created by thinking about the following six areas. Start with the business objectives you wish to meet. Then define your success criteria – what does ‘success’ mean to you and how will you know when you have reached it?

Third, devise your high-level strategic approach (answer the question, “What are we going to do?”, *not* “How are we going to do it?”).

Next, create a tactical plan, specifying the ‘How’: the tasks you will perform at daily, weekly and monthly levels. Then set down your measurement practices, including milestones along the way so you can celebrate (if you so choose) your minor ‘wins’ on the way to your major business objective win.

Finally, define the tools you will use and the processes you need to put into place to ensure that they are both working in a general sense and working for you specifically in relation to your particular needs and requirements.

The box out shows an example table of contents for a social media strategy document. It is taken from Neicole M. Crepeau’s excellent resource and blog, *Coherent Social Media* (bit.ly/mZKkd9), and is reproduced here by kind permission.

Crepeau makes an excellent point about your new strategic document:

“The strategy goes through numerous iterations, and even once it’s delivered, it’s not set in stone. Social media is social—your strategy is an attempt to create and shape the social environment to support your business goals. But the communities and their members are the ultimate owners. Social media strategies must be flexible and dynamic. Plan to review, update, and adjust your strategy regularly during the course of its execution.”

Example table of contents for a social media strategy document

- Executive Summary
- Goals, Strategy, and Success Criteria
 - detailed Criteria and Interim Measures
 - Suggested Measurement Processes
- Tactical Plan
 - Phase 1 Tasks
 - Phase 2 Tasks
 - Phase 3 Tasks
 - ...
- Tools and Processes
 - Getting Your Facebook Vanity URL
 - Creating your Badges
 - day to day Social Media Work
 - Posting/Tweeting
 - General Monitoring, Measuring, and Reporting
 - daily Measurement Tasks
 - Weekly Measurement Tasks
 - Monthly Measurement Tasks
 - Quarterly Measurement Tasks
- Social Network Guidelines
 - demographic data Content
 - Recommendations

Why even *have* a strategy? There is a contrarian view held by many social media theorists and senior practitioners (such as Euan Semple, formerly of the BBC) that going through a ‘strategy-setting’ process is a complete waste of time.

Their argument, not without merit, is that the tools are so cheap to install and so quick to learn to use that the organisation can very quickly see if they will ‘work’ or not within the organisation’s culture. Yes, there is still a place for the evangelist to proselytise social media’s potential, but a culture of ‘fail fast’ should be considered when using these rapid-to-deploy tools.

The fail fast culture insists that it only takes a short while to see if something is working or not; if it's not then jettison it and try something else.

The contrarian view also holds that because of the ubiquitous nature of the conversational tools of social media, there is no agency or function within an organisation that cannot in some way benefit from or contribute to the global conversation. So rather than contact with the outside world being limited to a few tightly-managed individuals with strict KPIs, the organisation should instead let those who wish to converse do so, no matter within what function or department they currently sit. Let them speak, it is argued, in a recognisable human voice (as distinct from the cold, distancing language of the corporation) to those who understand their language – the language of accounts receivable, perhaps, or of administrative services or records management.

The benefits of a customised social media strategy

There are benefits to creating a social media strategy that is customised to your company, rather than just picking one off the shelf. Customising a strategy for your own organisation's needs (and reviewing it at least annually) can offer the following benefits.

Productivity increase

By implementing social technologies 'behind the firewall' you can speed up time to market and reduce knowledge acquisition blockages. For example, replacing the endless circles of e-mail and document management and change with a simple wiki can deliver tangible results.

Law firm Allen & Overy² decided to embrace social media as it is well suited to environments such as law – constantly changing and requiring a large amount of

information sharing. It started off with three pilot sites, each with a combined blog and wiki. The results were astonishing and Allen & Overy now has nearly 30 sites for practice areas, new legislation, etc. These sites make it easier for lawyers to answer questions and collaborate on cases. Social media is also used for training events and for people to discuss the issues raised at such events.

Lowered operational costs

If the endless 'paper chase' of revised documents being sent to members of a project team can be instantly cut by implementing a wiki, a no-cost tool that takes an hour or two at most to install and set up, then the cost of each project is surely reduced.

But there are other costs that are lowered, too. Erik Qualman on his Socialnomics.net blog reports that wine aficionado and maverick wine seller Gary Vaynerchuk found that US\$15,000 in direct mail brings in 200 new customers, US\$7,500 spent on billboards brings in 300 new customers, but US\$0 spent on Twitter has brought in 1,800 new customers. Vaynerchuk has grown his family business from US\$4m to US\$50m using social media.

Computer manufacturer Lenovo was able to achieve cost savings through a 20 per cent reduction in call centre activity as customers increasingly go to its community website for answers.

Increased worker flexibility

Knowledge workers are able to work remotely, saving the organisation seating costs. For example, Twitter customer service teams can work from home yet still offer full support, utilising private Twitter conversations, wikis/intranets and e-mail to solve customers' problems.

Journalists and employee communication professionals can file their photo- or video-

included stories from the field, rather than having to return to the office.

Podcasts and vidcasts can keep remote area sales staff on the road for longer, with fewer stops back at HQ in order to update their knowledge and view their sales statistics.

Knowledge sharing

Blogs and wikis are tremendous tools to capture the knowledge of baby boomers who are retiring from the organisation; especially so if they are encouraged to remain an alumnus/alumna member of the organisation via one social media channel or another.

Equally, they can serve as knowledge tools for existing or 'new hire' employees. New hires can quickly update themselves on the company's culture by listening to podcasts about the company's 'story' on the way to and from work, or watch videos about cultural or process issues on their iPad or other video-enabled device.

Enhanced relationship marketing

By incorporating social media tools into your overall communication strategy, you have the opportunity to build up trust within the

organisation and with clients, customers and other outside stakeholder groups. People will feel they are communicating with other people, not with a faceless corporation, and be less likely to be virulent in their approach, and more likely to be open to engaging in honest conversation.

All of the above benefits are dependent upon the organisation introducing social media into its communication strategy. The tools themselves are able to bring little benefit if they are not applied in a strategic manner.

But because each organisation is individual, with its own exigencies and requirements, its own politics and culture, it is impossible in this report to provide any more guidance than this: ask yourself and your organisation the questions found at the beginning of this chapter.

Once you have those answers you are on the way to creating a sensible strategy for your own organisation; just don't forget to review it annually (sooner if appropriate) and make sure to take measurements at the start of your planning process so that you have benchmarks against which to measure your progress.

Case studies: Social media use that supports business objectives

JetBlue

The North America-based airline joined Twitter in 2009, one of the first of the world's major brands to do so. Why did it join Twitter? To help customers.

"Some people were asking for help, and others were saying things that weren't correct," recalls JetBlue's manager of corporate communications, Morgan Johnston. This reflects the earlier discussion about the RRISC model in Chapter 1: providing correct information and addressing unhappy customers. He'd been spending time on Twitter search, and he'd realised that JetBlue customers, often on the move, were tweeting about travel problems. "You can only see that a few times before you want to jump in and do something."

They started slowly, as it gave the company time to learn what worked and what didn't. Johnston hit on what he calls the Twitter "kernel of truth": be receptive to what your followers want. He asked them on Twitter and he got answers. JetBlue's next challenge is to staff the account 24/7, so that travellers can get a quick reply at any time.

Regarding return on investment, Johnston says “Qualitative rather than quantitative improvements” is what Twitter is about, not ROI.

Teusner Wines

Teusner Wines is a boutique winery in Australia’s Barossa Valley with three employees. Dave Brookes is the entire sales and marketing department. A cycling fan, Brookes was watching the Tour Down Under in January 2009 when he noticed that Lance Armstrong was on Twitter. “I followed him,” says Brookes (you can find Lance at @lancearmstrong).

Brookes’ goal for using Twitter was simple: to promote the business by “building relationships with customers and potential customers.”

Brookes created a Twitter account for Teusner, and to get started, he conducted a Twitter search for wine-related terms. When he found interesting and influential people talking about the business, he followed them. Then he started conversing about wine and interacting with them. When he finds them, he sends a friendly message. “We say, ‘Thanks for trying the wines, we’re really glad you’ve tasted them. G’day.’ They’re really surprised, and they’re happy to hear from us.”

Brookes, who keeps the exchanges relaxed, steers away from sales. “This is about building trust as well as relationships – and that comes from not selling.”

Since he started tweeting, Brookes says more people are coming to the winery for tours. The company has seen an increase in traffic to its website, along with a jump in the number of people from the US and Canada asking where they can find Teusner wines at stores and restaurants near them.

What else does Brookes use Twitter for? Gathering feedback and sharing information. In addition to lots of chatting with Teusner customers and distributors, Brookes posts third-party reviews of the company’s wines; if they get a really stellar one, he might repost it a couple of times over a few days. He also shares information about tastings and dinners featuring Teusner wines, and he reports on what’s happening at the winery.

As Brookes says, “It’s building, we’re establishing new relationships, and people enjoy what we’re doing.”

Etsy

Etsy.com is an online marketplace for buying and selling all things handmade. Since launching in 2005, the company has grown to over 65 employees. More importantly, over 250,000 sellers have opened up shop on Etsy to sell their handmade goods.

Etsy decided to “just have fun” and experiment with using Twitter in a broad variety of ways. They quickly found that they could alert followers to particularly creative products from Etsy sellers, share valuable tips and tricks, provide information about upcoming events and promotions on the site, share information from individual Etsy sellers (via retweets), monitor and respond to Etsy-related questions and concerns that users express via Twitter, and garner feedback and ideas instantaneously, effectively creating focus groups from the @Etsy followers.

In addition, they found they could discover their users’ favourite Etsy items, design blogs and projects, and use Twitter as a tool for impromptu surveys and feedback.

In Etsy's experience, a company that constantly seeks to build community and voraciously learn from its users will find that Twitter is "amazing in the way it harnesses the collective brains of so many people." For example, one of the founders, Anda, recently tapped into the community to come up with helpful tips for craft fair season.

@Etsy has also realised that great content on Twitter has the opportunity to reach new users who were previously unaware of Etsy's website. Anda often tweets about particularly unique and creative handmade items that Etsy sellers have listed. The coolest items are subsequently retweeted by @Etsy followers, exposing a broader audience to the handiwork of Etsy sellers.

Etsy's advice to companies new to twitter is to use it as @Etsy does: "to connect, listen, interact, get feedback from our users that use Twitter too. And to have a little fun while we're at it."

Center for Wildlife

The US-based Center for Wildlife is a non-profit organisation that has looked to social media to meet two business objectives: increasing brand presence in the marketplace, and increasing the amount of donations coming in.

After having conducted a stakeholder analysis, they concluded that their tactical plan needed to provide answers to the following questions:

- What will you publish? Information about wildlife releases, wildlife intake, education, events, and how to donate.
- Where will you publish? YouTube – video; Flickr – photo; Facebook – all content types; Twitter – automatically fed from Facebook.
- How often will you publish? Weekly.
- How will you integrate with traditional channels? The website and newsletter signatures promote all four channels; e-mail signatures promote the Facebook and Twitter channels; event presentations mention Facebook and Twitter for post-event photos and questions; and there is an RSS feed from Facebook back to the website.

Namecheap

Namecheap is a domain name registrar which has been in business for 11 years and relies heavily on word-of-mouth advertising for business growth. Its one dedicated marketing resource, Michelle Greer, set up a Twitter account for the company and launched it to the world by running a contest. To convince the CEO, she showed him what Tony Hsieh, the Zappos CEO, was doing on Twitter, including promotions. He gave her the go-ahead to experiment.

Once an hour, she posted a Christmas-related trivia question (using SocialOomph.com to preschedule the posts and a book to help her come up with the 600+ trivia questions). To win, you had to be one of the first three @replies with the correct answer. The prize was credit for a one-year domain registration; to receive it, you needed a Namecheap account.

The company considers the contest a success. People got addicted to it, battling to get in the first replies. And they tweeted and blogged about it, too, helping Namecheap's follower count jump from 200 to over 4,000 in just one month and bumping the company's all-important Google PageRank, too.

What about the actual business numbers? Namecheap's site traffic increased more than ten per cent in that month, driving a 20 per cent increase in domain registrations. Greer added, "The increase in Twitter followers allowed us to see a 30 percent increase in traffic when we ran a Super Bowl promo on Twitter."

Nike

After creating a successful campaign for Nike, Ricky Engelberg, director of digital sport, released an 'insights' video, where he and Jesse Stollak (global digital director brand and innovation) shared why they released the campaign first on Facebook, a full three days before they released the content to YouTube and mainstream media. Just under four minutes long, it is essential viewing, particularly for those who ask, "Why bother with Facebook?" and you can find the video at <http://youtu.be/d2YXsk3Ey00>.

Louis E. Page Inc.

Louis E. Page is a distributor of mesh and fencing, based in Massachusetts. It specialises in high-quality woven and welded wire mesh fencing materials, and also sells a wide variety of premium woven and extruded plastic netting and meshes – all in all, hardly a product line that would appear 'sexy' to the social media world, you would think. But ever since the company started blogging, it has experienced an astonishing 850 per cent increase in sales leads.

A little surprised that there is an audience for such a niche product and that a blog about fencing could do so well? Mike Volpe, VP of inbound marketing at marketing consultancy Hubspot, explains:

"What you want to think about is who your customers are and what are the issues that are important to them. What are they thinking about? Usually it's about their problems, rather than the name of your product and things like that. So what you really want to do is blog about topics that are going to be interesting to your customers before they know who you are."

The company focused on delivering information their potential customers might be looking for, therefore building up a relationship of trust and reliability. They have monitored the results this activity has generated, including one whitepaper on how to use woven-wire fencing to build a horse paddock that received more than 1,500 downloads!

Cirque du Soleil

Cirque du Soleil wanted to grow its audience by extending the excitement and emotion surrounding the on-stage experience for which it is famous. The company has successfully leveraged a mix of marketing channels including e-mail, a loyalty club and an extensive website to spread that brand experience, however it wanted to create a more personal connection with customers.

Cirque du Soleil used Twitter's Promoted Accounts to grow its follower base and then engaged with them in real-time to answer questions about upcoming shows and to get feedback about past performances.

“Twitter allows us to emotionally connect with our audience by conversing with them in such an immediate and relevant way,” explains Lou d’Angeli, director of marketing and PR for the Resident Show division/North America. “Asking our Twitter followers about the show they have just seen brings back vivid memories for them. They not only love to talk about the amazing moments on stage but also how many performances they’ve seen. We retweet these comments to extend the reach and emotional resonance of our performances.”

After building an engaged base of followers with Promoted Accounts, Cirque du Soleil used Promoted Tweets to announce promotions and tour dates, normally conducted through traditional channels such as e-mail marketing. For its ‘Zarkana’ show in New York, Cirque du Soleil targeted a Promoted Tweet to its followers, announcing a three-day ticket promotion.

Cirque du Soleil gained, on average, over 360 followers per day directly from Promoted Accounts. During the same period it also organically gained over 340 followers per day, nearly double the number of organic followers it gained on a daily basis before it ran Promoted Accounts.

“Promoted Accounts extended our reach and had a halo effect that also increased our organic follower base,” explains Andy Levey, social media manager.

Cirque du Soleil also had success with its Promoted Tweets campaign — its *Zarkana* promotion on Twitter experienced a higher return compared to some of the more traditional forms of marketing.

“Real-time engagement and feedback are huge on Twitter,” says d’Angeli. “Unlike e-mail or other types of more traditional forms of marketing, we can use Twitter to be more relevant and responsive to our customers. This contributes to an engaged audience that is receptive to presales and sales events.”

JetBlue, Teusner Wines and Etsy case studies reproduced by kind permission of Jeff Bullas (bit.ly/d7pVmw). Louis E. Page case study reproduced by kind permission of Neal Schaffer (bit.ly/egjkkX). Cirque du Soleil case study reproduced by kind permission of Twitter (bit.ly/OqiOjs).

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Chapter 4: Identifying the appropriate metrics to use

By Lee Hopkins

ORGANISATIONS OFTEN ask the same question: “What should I measure?”

In the ‘good old days’ of the web, pre social media, measuring for some organisations was very simple: ‘hits’. That is to say, the number of hits captured on the company’s website in a given time period.

But as measurement doyenne Katie Paine says, hits are ‘How Idiots Track Success’. These days measurement is a

lot more sophisticated. In fact, Paine has an excellent measurement programme checklist that you can use to measure and manage your online presence – see the box out.

This chapter explains the importance of aligning any measurements with the business goals you’re trying to reach. It gives some examples of the kind of metrics that may be useful, and outlines some of the tools that may be used to gather and interpret the relevant information.

Measurement programme checklist

The original checklist was written by Katie Paine and the abridged version here is reproduced by kind permission.

Step One: What are your objectives?

1. What are your organisation’s key goals this year?
2. What are your department’s key goals this year?
3. What do you hope to accomplish with this project/initiative?
 - a) Budget approval;
 - b) Budget increase;
 - c) Head count increase;
 - d) More internal support;
 - e) More external support;
 - f) Justify my existence;
 - g) Get a raise; and/or
 - h) Get promoted.

Step Two: What audiences are you targeting?

List all of the different audiences, not just the ‘usual suspects’. If you’re not sure which groups to include, ask senior executives and the marketing team. Examples would include: media, prospects, customers, employees, governments, investors, thought leaders and NGOs.

How does a good relationship with your various target audiences benefit your organisation? does it, for example, increase sales? Increase attendances at functions/events? Increase donations? Increase employee loyalty? decrease absenteeism? decrease time to market?

Step Three: Set priorities

Prioritise your audiences: you have 100 points to allocate across all of your audiences; who gets the most points?

Step Four: Determine a benchmark

Compare your results to competitors and peer companies, industry benchmarks, yourself over time, last year's results and last quarter's sales and/or web/commerce metrics.

Step Five: Select the right measurement tool

If any of your objectives in Step One include awareness, attitude change, education or improvement in products or services, you will need to conduct an online audit via social media to determine the state of play and establish a benchmark.

If you are looking to measure sales and leads, track website traffic and consider referring sources (offline as well as online) and existing hurdles to conversion (such as a poor landing page or too-complex purchasing/shopping cart process).

If you are looking to measure influence then you might want to look at factoring in some of the following criteria:

- Tone of coverage;
- Share of voice compared to competition;
- Audience reached;
- Prominence and dominance of coverage;
- Key analysts quoted; and
- Key topics discussed.

These are just some of the elements to the checklist; I strongly recommend you visit Katie Paine's website to read the entire checklist: kdpaine.blogs.com

In the traditional world of marketing measurement, determining the effectiveness of a print or television campaign is tricky, unless a specific and traceable call to action is made.

In the online world, however, everything is measurable, right down to which version of online ad copy drew the most sales, or which product video generated the most sales revenue or led to the biggest reduction in calls to the customer service centre.

There are a dazzling number of tools and websites that offer measuring capabilities, but not every site meets every need; therefore careful consideration and determining 'the right tool for the job' is essential if time and money are not to be wasted.

Let's first consider what you might want to measure, seeing as there are almost endless variations of tools and KPIs. depending on your business goal

(yes, any measurement must always tie back to an activity which is driven by a business goal) you might want to measure:

- direct and/or indirect traffic to your site and/or blog;
- Online brand mentions;
- Leads;
- Brand awareness;
- Sales;
- Customer satisfaction scores;
- Brand perception;
- Comments on your social media channels;
- Frequency of customers/peers linking to your content;
- Speed of the sales cycle;
- Percentage of repeat business;
- Cost per lead;
- Number of members/followers;
- Number of comments/ideas;
- Issue resolution time;
- Account turnover;
- Employee turnover;
- Hiring/recruiting;
- Product adoption rate;
- Brand loyalty;
- Share of conversation;
- Sentiment;
- Community engagement; and
- Competitor activity.

What you *can* measure

This being the internet, there is exceedingly little that cannot be tracked, traced and monitored. Table 1 overleaf is a non-exhaustive list of data sets that can be gathered. No doubt a few minutes spent thinking about your organisation's own business goals and online activity will generate some more, specifically for you. Always remember to keep your eye on the business objectives that your social media programme is aiming to support.

Some words of caution

don't fall for the fool's wisdom that the greater the number of followers your organisation has, the greater your success. Follower numbers tell you very little. After all, it is very easy to click on the like button on Facebook, or follow someone on Twitter; the number of people actually paying attention to you is quite different.

I've done it myself – momentarily recognised an organisation or brand, hit the like button and moved on with my life. As I type this I have 353 brands, organisations, charities, associations and fan-created pages that I have liked on Facebook. Without looking at the list I would be hard-pressed to name more than six of those entities.

The same goes with followers on Google+. I follow 2,614 other Google+ members, but I only know a handful personally. Even though I have carefully segregated those 2,614 people into various circles, there are only two or three circles I look at regularly, thus exposing me to the updates from perhaps two dozen people at most.

The social web is not a popularity contest, and whoever dies with the most followers doesn't necessarily win.

Instead, ensure that anything you track and measure is related to business outcomes. Think 'sales conversions', not 'follower numbers'. As Olivier Blanchard says, "Popularity and popularity metrics are not necessarily what you want to spend a lot of time and energy on."

Remember to track your progress over time and not be overly concerned about what is happening 'right at this minute'. Levels fluctuate – some days you are talked about, other days not. Some days you gather a lot of likes, some days fewer. Positive and negative sentiment fluctuates daily. Focus instead on trends over time, not single data points.

Twitter	<ul style="list-style-type: none"> ■ Number of followers ■ Number of retweets (RTs) per day ■ Number of mentions (@) per day ■ Number of outbound tweets sent per day ■ Number of outbound replies sent per day ■ Number of click-throughs (to your website, to a landing page) generated per day
Facebook	<ul style="list-style-type: none"> ■ Number of fans (even if they aren't called fans anymore) ■ Number of status updates per day ■ Number of likes per day ■ Number of likes per update ■ Number of click-throughs (to your website, to a landing page) generated per day ■ Number of comments per day ■ Number of comments per update ■ Number of shares per day ■ Number of shares per update ■ Number of other events per day (e.g. event RSVPs, white paper downloads, discussions, photos added)
Blog	<ul style="list-style-type: none"> ■ Number of visitors daily ■ Number of unique visitors daily per blog post ■ Number of comments per post ■ Number of comments per day ■ Number of click-throughs to your website from your blog per day ■ Number of views per video ■ Number of listens and downloads per podcast ■ Number of downloads (white paper, Pdf, etc.)
Customer support	<ul style="list-style-type: none"> ■ Number of requests via Twitter per day/hour ■ Average number of replies to complete a customer service request ■ Average amount of time to complete a customer service request ■ Number of positive outcomes to customer service requests (positive resolution) ■ Number of negative outcomes to customer service requests (no resolution)
Reputation	<ul style="list-style-type: none"> ■ Number of positive mentions across various channels (separate general praise for the brand from specific mentions directed to a company social account) ■ Number of negative mentions across various channels (separate general criticism/complaints about the brand from specific complaints/criticism directed to a company social account)
Internal/HR	<ul style="list-style-type: none"> ■ Number of hires per month ■ Number of leavers per month ■ Number of candidates per vacancy ■ Amount of time taken to fill a vacancy
Other metrics	<ul style="list-style-type: none"> ■ Net potential reach ■ Number of unique visitors to your website

- Number of unique visitors inbound from seeded links across social channels (including broken down by channel)
- Net online transactions
- Number of product reviews (including total number, number that are positive and number that are negative)
- Footfall in physical stores
- Response to promotional offers (via tracking codes, specific bit.ly links, hashtags, QR codes, etc.)
- Event attendance (physical and virtual)
- Number of transactions
- Net sales volume (broken down into as many subsets as you choose – location, product, product category, etc.)
- Number of transacting customers
- Average frequency of transaction
- Average revenue transacted
- Conversions (both offline and online)

Table 1: data sets that can be gathered to monitor social media impact

Google Analytics

When measuring what happens on your company website, blog or public forum, a free tool produced by Google, 'Google Analytics', comes into its own.

By adding a small piece of JavaScript code to your online property you can track interactions on your site, see where changes or additions have helped or hindered your cause, and monitor your reports and automatically be alerted of significant changes in data patterns.

Google Analytics can help you track various demographics about your website's visitors (such as their location in the world and their language), their behaviour (new versus returning visitor, the frequency and recency of their visit, and how engaged they are with your site), what type of browser and operating system they are using, if they have come via their smartphone/tablet or the traditional desktop browser, and where the traffic has come from (from a search, in which case what keywords were used, or referral from another website, in which case which site and page, for example).

There are other metrics that are captured, but what is important here is not the minutiae of data that Google Analytics captures, but

what an incredibly powerful tool it is for answering key questions, such as:

- How much of my traffic is coming from smartphones, and is this increasing?
- How is our site being found on Google?
- How much of our traffic is coming from social sites? and
- How many Facebook likes have the articles on our website generated?

These sorts of questions and more are fodder for Google's powerful Analytics software – which is free to use, the only investment being time to learn how to drive it properly.

Even then, there are resources available to help you do that. Not only are there excellent help files for every page, but a quick search through both Google and YouTube turns up a plethora of handy hints and quick tips on getting the most out of Google Analytics. And if someone as number-blind as I am can use it, then I'm sure the average manager will have no difficulty in getting their head around it and extracting tremendous value from it.

The benefit comes, of course, not just from what the captured data tells you

prima facie, but more from what that data, captured over time, tells you. You can set yourself goals within Google Analytics to measure how you are performing on several metrics.

For example, you can aim to have more of your articles shared socially (through Facebook likes and Google+ '+1's for example), or you can aim to have a greater number of shares per article. Both of these goals can be tracked in real time so that you can at a glance tell if you are on track or slightly behind.

Google Analytics is great for seeing what your visitors from social sites are looking for and doing on your site, such as showing you the path of visitors from social sites

to different pages on your website. As an example, for my site, leehopkins.com, I can see that in one month, Yahoo! Answers sent me 38 visitors, Facebook sent me 26, Twitter a mere eight and LinkedIn a close seven. From there some went to my index page and then left me, others delved deeper into the site to, perhaps, grab a free e-book or find out who some of my clients are.

Eighty-four visitors in a month is not a lot, but then again I don't advertise this site on my social channels, so it's not surprising that they gather so little traffic. Perhaps a call-to-action for me is to promote my site more and generate more traffic from non-Google search referrers.

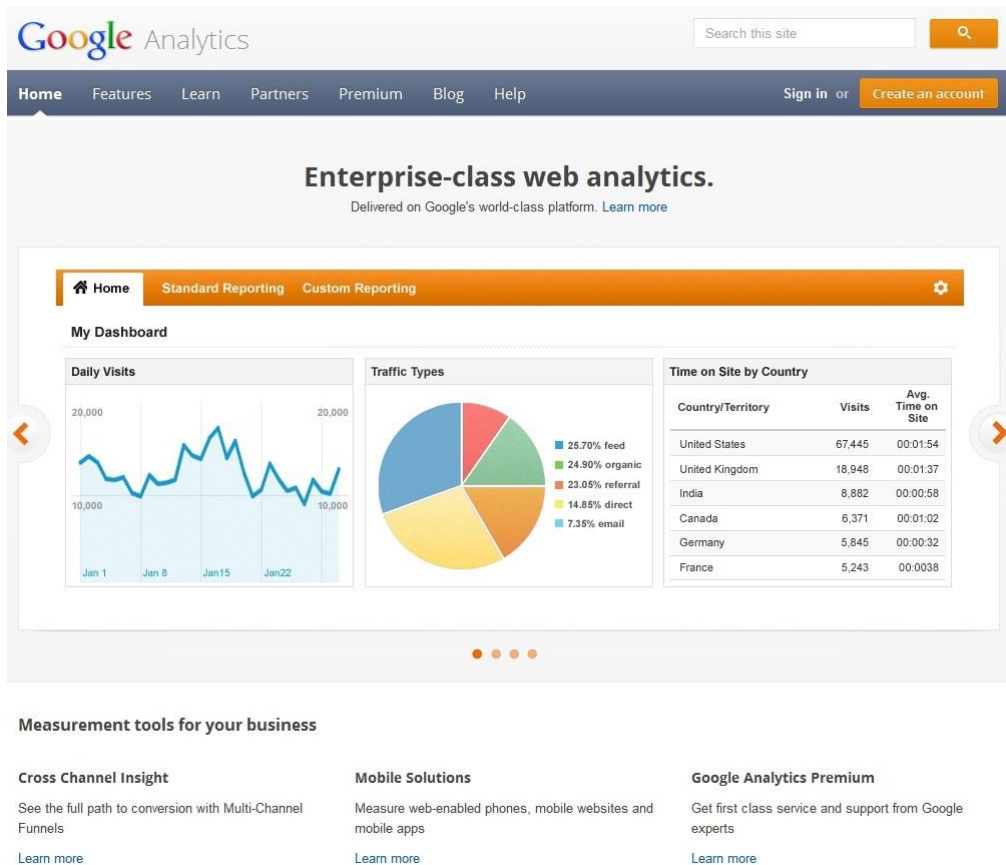


Figure 1: Google Analytics homepage

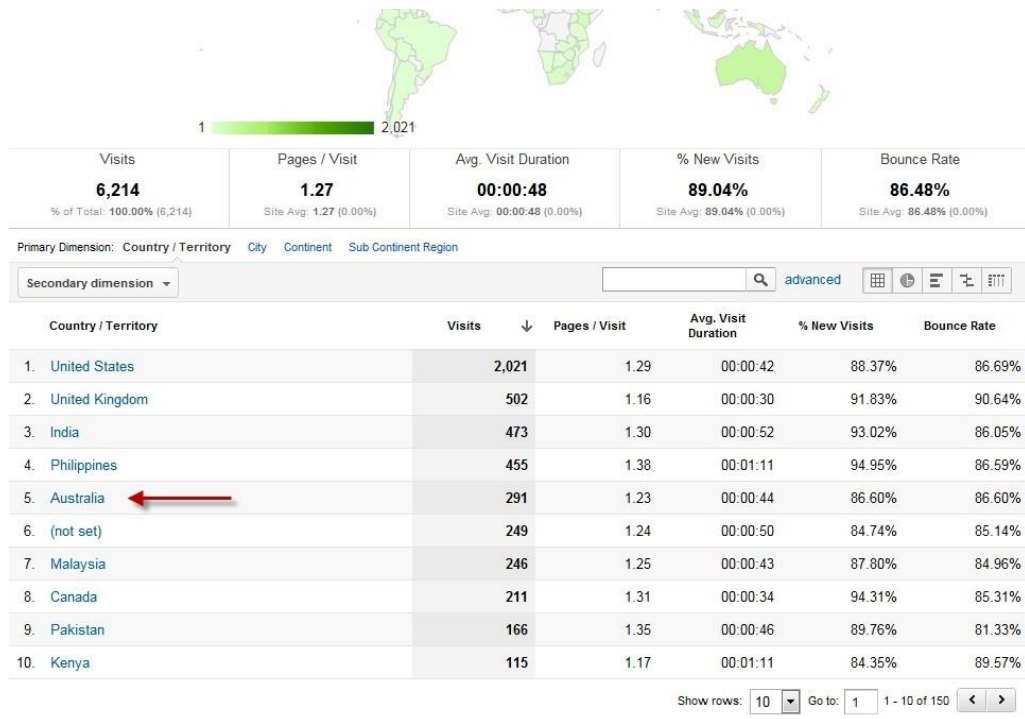


Figure 2: Traffic by country

As Figure 2 shows, a lot of my traffic for my .com site comes from outside of Australia. I happen to know that the vast majority of my traffic for my blog, leehopkins.net, comes from Australia, followed by the US and Europe. A possible call-to-action for me is to improve my Australian visitor numbers on my articles site, perhaps by promoting articles through my social profiles on Facebook, Twitter and LinkedIn. With over 250 articles on my site, there's plenty to choose from.

To get the most from your analytics investigations, I recommend you purchase a copy of *Web Analytics 2.0* by much-lauded analytics guru Avinash Kaushik.¹ It really is a superb work and the accompanying Cd-ROM has some superb videos and resources that will quickly help you appreciate the power of structured data, allowing you to make tactical and even strategic decisions based on real data, not what

the HiPPO thinks (HiPPO = highest paid person's opinion). Although the book was written before Google Analytics started tracking social media, his book still contains enough analytic gems that it is worth its price ten times over. As it probably should be: Kaushik is the digital marketing evangelist at Google, as well as the recipient of many awards for his statistical insights. He runs a superb blog on analytics at Occam's Razor (<http://kaushik.net/avinash>). One of my favourite recent articles of his is 'Best Social Media Metrics: Conversation, Amplification, Applause, Economic Value' (bit.ly/MqsU3I).

Google Analytics is just one monitoring and measuring tool of many. Chapters 5 and 6 go into greater depth on dashboards and monitoring.

Sentiment analysis

Leximancer provides an online and desktop tool that enables you to navigate the

complexity of text in an automated fashion. Rather than just identifying keywords, the software spots ‘concepts’ – focused clusters of related terms that the user defines, not a predefined dictionary or thesaurus.

Of course, you do have to do a bit of leg-work first, but the results are definitely worth it. This is not simple point-and-click software; it was designed for academics but has found a home in some of the world’s largest companies.

If you want to find out more about Leximancer, there is a promotional video on YouTube (<http://youtu.be/plxoQ04zMe4>) that explains some of its features and benefits. There is also a video showing a text analysis, including online media coverage of political combatants in an election, at <http://youtu.be/qLY32c1Hb1s>.

The marketing–sales relationship: FRY

For many years marketers and sales people have been at slightly crossed purposes. Both groups have had the same aim – to sell more stuff – but sales people knew that to do that was a numbers game (knock on more doors, make more phone calls). Marketers, from their perspective, knew that the better the product, the closer the fit to a customer’s wants and needs, the greater the chance of selling it.

But put marketers and sales people into the same room and often you would think they were antagonistically opposed.

It wasn’t until ‘FRY’ (frequency, reach, yield) entered the vocabulary of business that the two groups could be brought together under the one rubric. Olivier Blanchard is the world’s most popular evangelist for this way of approaching business development and he goes to great lengths to explain it clearly in his book, *Social Media ROI*.² What follows is a synopsis of his work.

FRY splits up ‘sales’ into three distinct drivers:

- Frequency, which is also known as ‘buy rate’;
- Reach; and
- Yield, or average value of a transaction.

Let’s think about how sales and marketing are usually conducted.

We want to sell more umbrellas. So we create a marketing programme around promoting umbrellas. We make adverts showing how funky and hip people using our umbrellas look, and how celebrities love using our umbrellas. Those adverts also point out how much better their lives are because they have our umbrellas.

Of course, we remind people that umbrellas are fashionable at the moment, this being the season of umbrella-carrying, and our umbrellas are very fashionable, whilst still being utilitarian and hard-wearing. We generate great reasons why people would want to buy our umbrellas rather than someone else’s, and we of course contact influential bloggers with free samples so that they too can join the chorus of voices singing the praises of our umbrellas. We flood Twitter with pithy, funny quotes from celebrities who carry our umbrellas, and we inundate our Facebook page with photos of said celebrities, along with Joe and Joanne Public, looking successful, happy and sexy with our umbrellas.

We rent billboards to show how wonderful, fun and hard-wearing our umbrellas are, and of course we ensure that anyone who searches for the word ‘umbrella’ on Google gets a search return that has a link back to our website at the top of the results. Our website, naturally, devotes a lot of space to our umbrellas, with gorgeous images and snappy copy.

Sometimes this will work to sell more umbrellas, sometimes it won't. That's just about all of the weaponry we have.

Or had, until now.

FRY gives us a new language and a new way of looking at the buying pattern.

Let's bring it into a social media situation for a moment. Which scenario is most likely to resonate with senior management?

Scenario One: "Wow! This social media thing is the business! It's even more powerful than e-mail for generating sales. Your competitors are using it so you need to catch up, otherwise you risk looking like a dinosaur and you'll be out of business in five years. Everyone is on Facebook, and YouTube is the second largest search engine in the world. You need to be there too. What we'll do is this: set you up a Facebook Page and a YouTube channel, plus a Twitter account, and we'll start engaging with the public. By generating engagement we will build sales. Honest!"

Scenario Two: "Aside from building up positive brand mentions on the various social networks, we can use those channels for various business functions, such as customer service, business intelligence, PR, marketing, reputation management and yes, even sales. But at the same time, why don't we also look at three elements that affect your bottom line: increasing the frequency of transactions, increasing reach (that is, acquiring new customers) and increasing the amount that your customers spend each time they transact with you. It's with those three drivers that we can use a social media programme to make a positive impact on your bottom line."

You'll find that senior management much prefers the second scenario to the first, which usually only generates fruitless "What

is Twitter and why would anyone do that?" sort of questions.

The second scenario leads you to discussing how to encourage customers who normally spend \$250 every six months to start spending \$300 every five months, and finding more customers like them. Far more fruitful conversations, don't you agree?

Hopefully now you understand the importance of thinking in terms of FRY. The social world has moved on from the 'gee whizz' thinking predominant three years ago; we can now be much more sophisticated in our thinking about our social media programmes.

Frequency

Frequency can be frequency of transactions, but also the frequency of interactions. If frequency of transactions is one of the goals, frequency of interactions can be one of its principal drivers.

Can you break down your existing customer/client list into how often they conduct business with you? Weekly, daily, monthly, quarterly, annually, and so on.

If you can, great. If you can't then you might want to investigate how you can capture and manage that data. If your company doesn't measure frequency, or doesn't use client/customer relationship management (CRM) tools, then ask your customers directly.

Armed with that knowledge, you can now create campaigns to increase frequency of transactions. If your organisation is a coffee house, encouraging your customers to partake of an afternoon coffee to help them over the 3pm hump would be one way.

Or if your organisation is a perfumery, advising your customers to reapply their perfume after lunch could be one tactic.

do you see what has happened here? We are no longer talking about how social media

will ‘do stuff’ for us; instead we are talking in the language of business about real-world bottom-line business objectives, which we then support with social media initiatives. It’s a vastly more sophisticated conversation.

What social media allows us to do is to reach out to those coffee drinkers and perfume wearers and remind them of our presence, as well as remind them how much they like drinking our coffee or how sophisticated and sexy they feel wearing our perfume.

We are not battering them with inane social media banter for no reason – we have a specific purpose in mind and a specific outcome we are looking for.

A measurement practice that encompasses the link between frequency of interaction and frequency of transaction is vital, and you should waste no time in putting such a practice into place.

Reach

Reach can be simply defined as the ratio of net *transacting* customers to those who are non-customers but who have been touched by either your own marketing efforts or by word-of-mouth. Effective reach means you have a 100 per cent conversion rate – everyone who comes into contact with the company or hears about it buys something. I can’t think of a product that has ever achieved a 100 per cent reach, because there are always new customers in some market somewhere that can be approached.

There is a pitfall that many organisations encounter at this point. These organisations confuse non-transacting with transacting customers. So their mailing list is full of names. But separate out the names of those who have bought from those who haven’t and you have a far more accurate picture of who your customers really are.

One group will be your customers, the others are just names on a list. It is the

former that will be the benchmark for your activities. The objective of your social media strategy is to grow that net transacting customer number, because that will drive up net revenue.

Can social media do that? Most certainly. To push out a message costs considerably less on social media channels than it does on traditional channels. Even if your conversion rate is one per cent, for every 100 non-customers your message reaches, you will grow your actual customer base by one.

And let us not forget that social media, unlike traditional media, comprises vertical and horizontal channels – your message can be spread sideways from channel to channel by fans, and vertically within that channel by your own activity. Social media can, in the language of marketing, considerably reduce your cost per impression and thus also your cost per acquisition.

How does it do that? Let’s consider how social media works. Say I am enamoured of the car manufacturer Mitsubishi. I ‘like’ Mitsubishi Motors Australia’s page on Facebook; I also follow their Twitter account and subscribe to their YouTube channel. Just by doing so I have moved myself from the ‘random potential customer’ to ‘serious potential customer’ column in Mitsubishi’s marketing department. I have put up my hand and said, “Please send me your marketing material”.

But a lot of what happens in the social world is not company-directed; my friends get to see that I am sharing and liking various Mitsubishi status updates, photos, videos and tweets, so word is spreading horizontally through the social media world. We also know that we are far more likely to believe recommendations that come from trusted friends than commercial messages that come from companies.

So rather than spend hard-earned revenue on billboards, TV adverts, radio adverts and so on, a fraction of that amount can be spent on social channels by experienced social practitioners to potentially reach a greater audience number, where the recommendations of friends far outweigh – in terms of influence – the messages of the organisation.

If FRY teaches us to ask, “Out of x people ‘reached’, how many have been converted to transacting customers?”, then the question we can ask of social media becomes, “How can we tie our social media activities to net new follower numbers and then to net new transacting customers?”

Yield

Yield is, in its essence, looking at customers and how much they spend per transaction.

If you could not acquire any more customers, because everyone in the world already buys from you, and there is no way you can increase the frequency of their purchases (there is no way they can buy more often from you) then how can you grow revenue? The only option open to you is to grow the value of each transaction.

One example of how to do this might be to offer greater value so that the customer is willing to spend a greater amount. Instead of their monthly flat-rate Service A, offer them Service B which comes with additional features.

Cable companies do this well. A flat-rate service comes with just the terrestrial channels and two paid-for services. But take the more expensive movie package and you get an additional three or more channels devoted to movies both old and new. Or combine it with the sports package and pay even more but receive an extra five channels of 24-hour sports entertainment.

Can social media increase the amount of money transacted each time a

customer purchases from you? The answer, not surprisingly, is ‘of course’. But the answer starts outside of your social media programme. You need to know the fiscal value of each transaction; only once you have this number can you begin to track any changes in buyer behaviour.

Once you know what your value per transaction figure is, you can track campaigns across all of your communication channels to see where growth is coming from.

For example, if advertising on TV use a promocode ‘01TV’, if using print media then use ‘02PT’, if using social channels use ‘03SM’... You get the idea. At the point of sale, capture the relevant code to track which channel has been most effective for you, and at what cost.

You can, of course, seed promocodes into social channels individually, so that Facebook becomes ‘03FB’, YouTube becomes ‘03YT’, Twitter becomes ‘03TW’ and so on. This way you can see which channel works best for you. After all, there is little point spending time and effort on a channel if it yields little value for you.

Summary

That which isn’t measured cannot be improved, yet surprisingly often when something is measured and tracked it *does* improve, if only because of the sudden focus and interest expressed about it.

Google Analytics is a powerful tool that enables you to see who is reaching your website, who is reaching your blog, and what they are doing when they get there. From that knowledge you can make better use of the resources you have and spend less on areas of the site that aren’t generating business outcomes for you.

Leximancer is a powerful tool for looking at sentiment analysis more accurately than other tools out there. designed for

academics but now finding a home in major companies, Leximancer is easy to drive yet powerful in its findings.

Finally, FRY is a wonderful way of looking at bottom-line improvement and how social media can create significant impact.

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1. Kaushik, A., *Web Analytics 2.0: The Art of Online Accountability and Science of Customer Centricity*, Sybex, 2009.
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Chapter 5: Aligning dashboards with social media objectives

By Anne Bartlett-Bragg

- How do you manage the flow of information from social media channels?
- How do you find out who is mentioning your brand, or a competitor's?
- How do people feel about your brand, product or service? Is the sentiment positive or negative?
- How are your social media campaigns performing?
- How do you analyse all the data to gain brand insight?

All of these questions are essential considerations for measuring social media ROI.

This chapter and the next review how social media dashboards are being used to monitor, engage and provide analytics for organisations in an attempt to filter and distribute communicable answers to the above questions. This chapter addresses how to understand the capabilities of dashboards and align these to the social media objectives, which will be critical in the selection of appropriate software platforms. A case study is included to illustrate how dashboards have been implemented within an organisation and how valuable information is being gained that can be communicated to the business.

Introduction

The tidal wave of social media data can seem like an endless stream of messy,

unstructured conversations, sometimes continuous flows, sometimes episodic. Only one thing is certain: the volume is exponentially increasing at rates beyond expectations, while new social networks and platforms are launching more frequently, causing further fragmentation and distribution of social channels.

A recent study produced by IBM, 'From Stretched to Strengthened'¹, based upon conversations with 1,734 chief marketing officers, across 19 industries and 64 countries, identified that using data from social media would enable them to focus on relationships, not just transactions with customers. One of the three key areas for improvement stated the need for the capability to capture, value and measure results in a quantifiable manner. Sixty-eight per cent believed they were unprepared to manage social media and 71 per cent believed they were unprepared for the explosion of data, seeing these two issues as the most prominent challenges for 2012.

Regardless of how your organisation views social media, now is not the time for complacency and allowing the flow to become overwhelming. A significant number of technology platforms have been developed to provide a range of services that monitor, manage and provide analytics for measurement and gaining insight from social media. However, the selection of appropriate technology is still not without challenges.

What is a dashboard?

The analysis of data within businesses is not a new concept. Business intelligence (BI) has been practised for most of the 20th century. As work practices became more automated, data could be easily collected and reported, using enterprise resource planning (ERP) or CRM systems, and sales departments have been analysing and reporting performance against agreed standards or targets for over 20 years. BI as a marketing analysis tool has also been effectively used by many organisations through various methods ranging from market research focus groups to analysis of trends in consumer behaviour, together with industry or business environment insights and trends.

From an information technology perspective, a dashboard is simply a user interface that organises and presents information from multiple sources in an easy to read manner, in a unified display. dashboards have been used to collate and present BI since the dawn of the use of computers and specific software has been developed to manage business functions.

A dashboard allows managers to step back from the details and see the key trends and relationships that drive their companies – typically in graphical representation, over specified periods of time. An overview of progress towards objectives can be viewed daily by operational functions, weekly by management, and monthly or quarterly by senior management to review trends and performance, while each element contained in the dashboard can be interrogated for more detail.

It was an obvious next step, from a BI perspective, to include social media in to the suite of currently available dashboards. However, the use of dashboards in social media management contexts has evolved more recently with a focus on enabling users

to manage and co-ordinate the enormous amounts of data and information being generated through the diverse range of social channels. To this extent social media dashboards depart from a traditional BI dashboard for management indicators, instead becoming a daily operational tool. Many businesses view a social media dashboard as a point to gather information and monitor conversations being leveraged within social media channels, in real time. Others are using the dashboard to examine data being generated; from the number of brand mentions, to the number of fans, to levels of engagement in campaigns, through to analytics that provide brand insights.

The development of social media dashboards has followed the trends of business demands and resulted in an extensive suite of products that each offers subtly different functionality and outputs. The next section describes the anatomy of a social media dashboard in an attempt to clarify how each core functionality can contribute varying, yet compatible, management of social media activities conducted by a business.

Anatomy of a social media dashboard

Social media dashboards can be loosely divided into three core categories with the following key characteristics:

- Monitoring;
- Engagement; and
- Analytics.

The key characteristics can be aligned to the evolution of social media maturity stages within businesses. Figure 1 indicates a typical pattern of maturity, from initial monitoring or listening to the social media landscape, to engaging or responding on specific

social media channels, to using data gleaned from these experiences to inform insight and further action. More recently, the pattern of integrating social media dashboards within social media teams, incorporating their daily workflows to existing systems, is becoming more prevalent. Concurrently, the social media dashboards have transformed to combine functionality to support business maturity.

Monitoring

The rapid increase in social media usage prompted brands to take notice as the conversations about their products and services shifted into the social network and community spaces, and where word of mouth reviews were identified as major influences in customer decision-making. Yet a report released in May 2012 by Satmetrix² found 39 per cent of global organisations still have no social media monitoring processes in place.

Early social media dashboards evolved to help brands automate finding online mentions and conversations. These dashboards are frequently referred to as listening platforms and still play an essential role, underpinning the fundamental basis for determining social media strategies.

As the first stage in social media maturity, many brands are listening to discover how their customers are using social media, where the conversations are occurring, what

people are saying, and in some instances listening to a product type or industry to determine how their competitors are (or are not) using social media.

As a result of using a dashboard to monitor to social media channels, a company should be able to answer the following questions:

- Where are conversations referring to a brand, product or service occurring? For example, product reviews of cameras are frequently found on specialised photographic communities, whereas travellers making comments about service at an airport more commonly use Twitter.
- When are people using social media? For example, are people using social media to research a product prior to making a purchasing decision, or are they using social media for post-purchase customer support?
- What is the nature of the conversations about the brand, product or service? For example, are people exchanging opinions or tips on how to use a product or service, or are they using social media as a platform to vocalise a complaint?

In addition, more brands and public utilities are using social media monitoring to listen for early alerts of crises. For example, some international

airports have sophisticated monitoring systems that will alert their crisis management team should social media channels identify a pattern of words to indicate an incident requiring emergency procedures to mobilise. The future trend of a social media command centres is

discussed in Chapter 6.

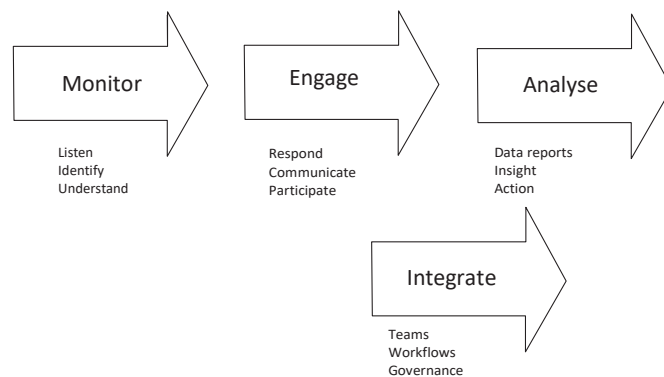


Figure 1: Social media maturity stages

Case study: Using social media dashboards at an international airline

The international airline covered in this case study has been actively using social media dashboards for the past two years. I discussed the social media dashboard with the general manager, marketing.

How do you use dashboards? What does your dashboard allow you to do?

We initially started using a dashboard to help us monitor the social media conversations that were mentioning our brand. Since that time we have progressed in our maturity of how social media strategically aligns with our brand objectives. As a result, we've started using our current dashboard product in a more sophisticated manner.

The dashboard functionality has enabled us to effectively manage our social media engagement with our customers. We are currently using a dashboard that monitors all our owned social media channels and aggregates mentions of our brand across multiple social media channels. Our social media team is then able to assign topic or keyword related tags, sentiment and make notes for future reference, while also being able to assign a mention or comment to another team member. In addition, we're using the dashboard to respond to customers via our Twitter account.

We are not able to effectively manage our Facebook page through this dashboard, so we're managing that directly through the Facebook interface.

What reports do you use?

We haven't been using the dashboard to its full capability for reporting, however, we are in the process of reviewing what sort of data can be gathered from the dashboard to provide some benchmarking for our social media activities. To date we have been able to use some of the data on a more ad hoc basis to reveal trends in sentiment towards new initiatives and to indicate how our customers are using our services and what issues they value most.

The use of the dashboard to report on levels of activity on a daily basis will enable us to review our social team structure as we further integrate social across other operational areas in the business. Additionally, we're now expanding our use of data from social media to provide deeper evaluation and insights. The current dashboard doesn't appear to have the depth of data capabilities to provide this, so we're trialling a couple of other social media data analytics dashboards at the moment.

What other features would you like to see incorporated into dashboards?

From an operational perspective, one of the challenges as we expand our social capabilities will be usability. Some of the systems we have reviewed would require detailed set-up and assistance from a technology support team, while the user interface isn't particularly intuitive either. For teams that are distributed and working in different timezones, I see this as a challenge for consistency of service through social channels, and also an issue for consistency of reporting. If the team aren't easily able to add tags or use the workflows or other features, it is likely the reliability of the data will be compromised.

I accept that at this stage, there is no single system or dashboard that is going to address all our needs, but it would be optimal to have a social media dashboard service that can offer a full service range, like we do as an airline service. You can pay for the basic model and get the basic features, but as your needs change and your team expands, it would be valuable not to have to review new systems on an almost annual basis. I'm hoping as the dashboard platforms mature and we, as clients, become more sophisticated, there will be new offerings that include a full suite of options.

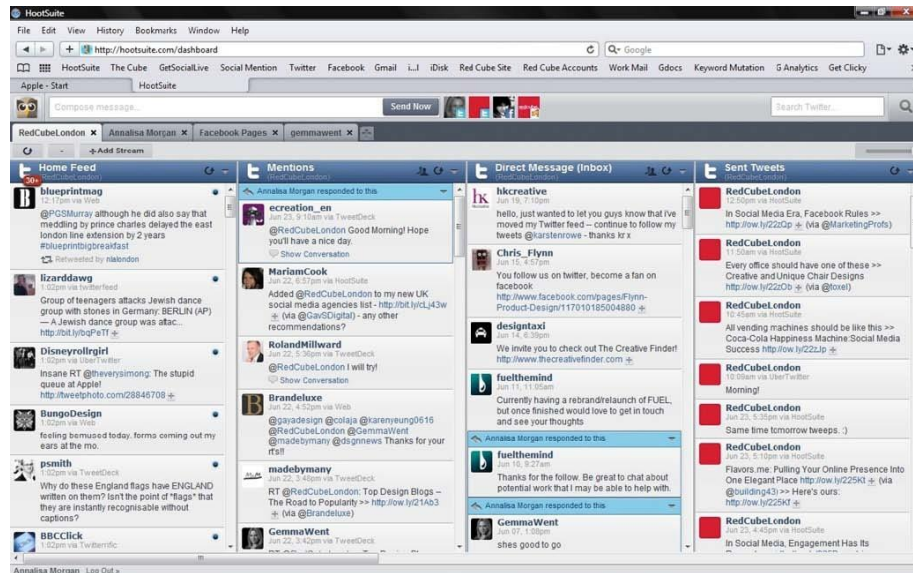


Figure 2: Example of a monitoring dashboard

The listening or monitoring function has matured and even the most basic free tools enable a variety of search terms and provide basic reports on activity levels related to the search terms. Table 1 in the box out overleaf provides a summary of features of dashboards, with some examples of popular social media dashboards that are commonly used for the monitoring functionality.

The key message from the monitoring stage: Listen with the intent to be influenced.

Engagement

While many businesses have progressed to the engagement stage, 55 per cent of companies have no process in place to respond through social media channels.³

The information gleaned during a listening stage can be used to develop a response or engagement framework – deciding where, when and how to use social channels. One outstanding customer insight is now clear: customers expect brands to be listening, and expect responses.

The listening research outcomes can be used to establish the following elements:

- **Tone of voice** – Social media users expect a conversational tone when engaging with brands, while brands are trying to maintain their official brand image. By monitoring the nature of conversations, a brand can begin to find its social voice, which frequently departs from traditionally crafted PR messages.
- **Select social channels** – Attempting to engage across all social media channels would be ambitious, if not fool hardy, in early stages of engagement. determining which social media platform is preferred by a brand's customers enables efforts to be directed where they will be most effective.
- **Determine times of coverage** – Together with selecting appropriate social media channels, it is important to understand the most active times of the day and plan to provide responses within operational capabilities.
- **Proactive or reactive response framework** – A decision to use social media as a

Examples of social media dashboards

Selecting a social media dashboard is not a straightforward process. Criteria regarding functional requirements will depend upon the business' social media maturity stage and aligning that with business objectives that clarify what actions the dashboard is expected to support.

There is no single, definitive social media dashboard that adequately addresses all aspects of social media monitoring, engagement and analysis, although with the rapid changes occurring in this segment of the market, it could be expected that major enhancements will see new entrants or more flexible options available in the near future. The following table is broken down by category and describes the features for each, including how this feature supports getting to return on investment and example platforms.

Category	Feature	Description	Example platforms*
Monitoring	Listening	<p>The platform provides a service to monitor social media conversations.</p> <p>Typically presented in columns or stacks, allowing multiple sources, search terms, usernames.</p> <p>NB: Not all platforms have the capability to source information across all social media types. In particular, Facebook brand pages are difficult to monitor beyond wall posts – not all dashboards have the capability to monitor comments on Facebook wall posts.</p>	<ul style="list-style-type: none"> ■ Radian6 ■ (SalesForce) ■ HootSuite ■ NetVibes ■ Lithium ■ ThoughtBuzz
	Reporting	<p>Activity based reporting derived from the specific search topics and channels being used by the monitoring platforms.</p> <p>Can be used to represent date related activity, basic sentiment, and share of voice.</p>	<ul style="list-style-type: none"> ■ HootSuite ■ Netvibes ■ ThoughtBuzz ■ Radian6
	Automated sentiment analysis	<p>Also found in some simple analytics features, but should be used with caution.</p>	<ul style="list-style-type: none"> ■ Alterian SM2 ■ Hootsuite ■ Netvibes ■ ThoughtBuzz
Engagement	Responding	<p>The capability to respond on social media platforms from the dashboard, using the brand's username/account. Typically, this capability relates to Twitter and Facebook, with some platforms extending the integration further to other social networking sites and blogs.</p>	<ul style="list-style-type: none"> ■ Radian6 ■ (SalesForce) ■ HootSuite ■ Lithium ■ ThoughtBuzz

	Teams	Supports multiple internal user accounts and supports the uses of permissions, to control what each user can and cannot do through the brand’s social media channels. This capability is typically paired with the capability to support workflows, however not all products that support teams also support workflows.	<ul style="list-style-type: none"> ■ Radian6 ■ (SalesForce) ■ HootSuite (Enterprise)
	Workflow	Provides tools for managing moderation, responding to feedback and social customer service tasks. Workflow should ensure that tasks are allocated to a particular person or team to be acted upon in a timely fashion. Workflow minimises the risk of duplicated or inconsistent responses, and also provides an audit trail of interaction.	<ul style="list-style-type: none"> ■ Radian6 ■ (SalesForce) ■ HootSuite (Enterprise) ■ ThoughtBuzz
	Integration	The platform supports integrations with other internal systems (for example, CRM systems).	<ul style="list-style-type: none"> ■ Radian6 ■ (SalesForce) ■ HootSuite ■ Netvibes
Analytics and insight	Simple analytics		<ul style="list-style-type: none"> ■ Radian6 ■ (SalesForce) ■ HootSuite ■ Netvibes
	deep analytics		<ul style="list-style-type: none"> ■ Alterian SM2 ■ ThoughtBuzz

*The list of example platforms is not exhaustive. Every platform is slightly different and should be evaluated on its own merits and how well each feature in the platform integrates together into a single solution and with other internal and external systems (for example, the organisation’s CRM system). Additionally, some dashboards have now developed both smartphone and tablet apps which may enable monitoring and engagement functions to be actioned through these devices.

Table 1: Examples of social media dashboards

reactive response framework (responding to customer service enquiries) or a proactive response framework (using social media channels as a marketing tool or for updates to service delivery) can be informed by research findings during the listening stage.

- *Marketing campaigns* – Monitoring the types of activities target customers participate in through social media

can provide valuable information to inform how a brand may want to use marketing campaigns to engage with customers, according to relevant engagement strategies.

Some social media dashboards enable the users to respond from within the platform using the corporate account details. Typically, this would include Twitter,

Facebook and some other more popular social media platforms.

In addition to the response functionality, the engagement dashboard may enable features such as:

- *Scheduling posts* – The ability to plan in advance and manage information releases through social channels.
- *Tagging* – Adding content-related keywords to posts that can be measured and analysed at a later date.
- *Team members* – Being able to assign posts to specific team members for action and/or follow-up.
- *Customer profiles* – Adding notes to social media profiles for future reference.
- *Workflow management* – The capability to direct a post for action into another system, for example, a CRM.

All these features are actionable and contained within the dashboard. Many of the monitoring dashboards now include the engagement process, however, not all have the full capabilities described above. See Table 1 for an overview of commonly used platforms that provide engagement tools.

The key message from the engagement stage: Create an engagement framework to inform tone of voice and how to integrate social media into workflows.

Analytics

As companies increase their knowledge and understanding of how to use social media, the question shifts to measuring the outcomes of interactions.

The third core category of dashboards is specifically designed to collect and interpret data from social media channels – the focus being on data collection, not monitoring and engaging in

Generally, a social media dashboard will include some degree of measurement. Monitoring platforms, for example, frequently include data reports related to the topics being searched or monitored. The reports derived will typically provide an overview of activity, that is, number of mentions related to a brand or topic; source of mentions – Twitter, Facebook or other sources; time of posts to indicate when highest or lowest activity occurred; and basic sentiment analysis. A more detailed explanation of popular data types is discussed in the ‘What to measure?’ section below.

Engagement dashboards, while including all the similar features to a monitoring platform, will provide reports that include number of responses made and actions related to team members, with a system to track open or closed issues for follow-up.

All the displayed data can be automatically updated without any action from the user, while the frequency of the reports will vary by organisation and purpose. Additionally, date ranges can be set with comparisons enabling benchmarking for identified activities and run at milestone times or dates.

data produced by dashboard analytics will typically be presented in visual analysis styles using charts, graphs and detailed data sources.

Primarily, the results are used to find correlations, trends, anomalies, patterns and business conditions. Each of these styles is typically highly interactive, allowing the user to inquire into each segment of data, filter and drill down to achieve more detail.

In general, the analytics dashboard will be based on historical data and can take a day or so to propagate the results, dependent upon the depth of search enquiry made. Real-time data provided by monitoring or engagement platforms is less reliable in

most cases for analytical purposes and could be viewed as an indicator of trends.

What to measure?

Aligning your social media measurements to your social media strategy and objectives is critical, however, social media has yielded new types of data that have previously been difficult to accurately gather and collate. Taking into account traditional methods of measuring ROI then expanding evaluation considerations to reflect new measurements will add a depth of value and focus on relationships rather than transactions.

Marketing promotions or campaigns

Basic data: activity or responses, for example, on Facebook the number of likes can be measured.

Intermediate data: levels of engagement, for example, how many people participated in a social media competition by submitting photos or taking action.

Advanced data: analyse the demographics of participants, measure the reach across other social channels, understand sentiment.

Benchmarking

Another traditional marketing measurement, easily applied across social media contexts. Most tools will enable brands to compare activity measurements by dates, for example, month by month comparison against activities indicates increases or decreases, shifts in sentiment, and levels of engagement with target audiences.

Sentiment

How do people feel about the brand, product or services? This may be recorded/ reported as positive, negative or neutral.

Sentiment analysis is one of the most sought after measurements from social media

data – yet it remains one of the biggest challenges for automated software analysis. Sentiment analysis uses natural language processing (NLP) which assesses words assigned as positive, negative or neutral, and will include punctuation marks such as '?' or '!'. However, the complexity of extracting sentiment, particularly where sarcasm is used, has resulted in most analytics systems enabling manual adjustment by the users to correct auto-assigned sentiment. Enormous improvements in the NLP field are being achieved by developers, which will continue to be reflected in dashboard capabilities (see the discussion of Leximancer in the previous chapter).

Influence

Influence, like sentiment, is widely sought after, with the expectation that engagement with someone of influence through a social media channel will result in further brand awareness or reach and valuable amplification of messages.

Analysts remain in conflict over the measurements that accurately determine the influence of an individual. Simply expecting the number of followers or friends to indicate brand influence can be (and frequently is) questioned. Popular free sites like Klout.com take into account the social graph of an individual across popular social networks and provide a score, however, it's unwise to rely too heavily on such simple measures. Chapter 6 includes further discussion about influence.

Demographics

Identifying people by their age, gender and education is a typical way to segment a brand's audience. Social media dashboards analyse the demographics of authors, and some examples are outlined below.

Age is approximate and is determined by a number of factors, most likely through

linguistic analysis that is applied to posts, to generate an estimate of the probable age range of the author (e.g. youth, adult, senior). This analysis allows a brand to assess whether it is achieving engagement with its target audience, such as 'under 19s'.

Education is determined through complex language analysis algorithms that take into account elements such as topics and vocabulary.

Gender is determined from the post and the social profile of an author; items such as names and context of posts are taken into consideration. However, in some cases gender is difficult to assign in an automated manner, leading to a high proportion of 'unknowns'.

Regions

Social media is global, so no longer can brand engagement be easily restricted to specific geographical regions. However, data can be gathered to identify the origin of authors and provide information about the reach of social media engagement activities.

Sources

The initial stage of maturity, monitoring, will enable a brand to determine which social media platforms contain the most conversations relevant to its target audience, for example, Twitter versus Facebook versus other social channels. Analysis dashboards will detail the source of conversations and a strategic response will empower a brand to adjust its engagement framework accordingly.

Other considerations

Data archives

A consideration when selecting a dashboard, particularly the analytics platforms, is how long data from the brand's account is stored and accessible to review. This feature may vary considerably based upon the dashboard's process for mining and storing data.

Data latency

If the dashboard is being used for monitoring and engaging, the data needs to be in real-time, immediately accessible. Results in elapsed time will generally be related to the analysis dashboards, where monitoring and engagement are not required immediately and detailed search parameters require the data to be propagated with a lag of sometimes up to 24 hours.

Language translations

Global brands are challenged with not only varying regional social networks, but also language differences. A small number of platforms provide translations and access to social networks outside the English dominated channels. Careful review with dashboard providers will ensure integration meets the requirements from not only the monitoring and engagement functions, but also the analysis perspective.

Scalability

Pricing models for social media dashboards vary with functionality, however, many have a limit on the number of brand mentions or search results per month, and the number of user accounts. It is recommended to work closely with dashboard suppliers to determine a model that meets the business objectives and enables an increase should it be required.

The key message from the analytics stage: Be purposeful, determine what social data adds value and align to business objectives.

Workflow integration

Engaging with customers via social media channels requires the integration of dashboards into daily workflow activities of employees to fully optimise the

capabilities provided by the dashboards. Some organisations have identified this requirement at the completion of the monitoring stage of maturity and will build in strategic resourcing to integrate workflows during the engagement and analysis stages. On the other hand, it is not uncommon for businesses to ignore this activity as unnecessary until they are confronted with an upsurge in social media activity or even a social media crisis, which may find them unable to effectively manage the social channels.

Social media dashboards with engagement capabilities need to equip users with the ability to allocate posts to other people within the business for action. Examples where this functionality becomes essential may be related to customer service questions or complaints. A team member tasked with responding to customer enquiries is unlikely to have all the answers; consequently, the ability to open a service ticket, allocate it or notify the relevant person or department of a query ensures the customer is responded to within service level time commitments. Many social media dashboards either provide this functionality or enable integration with social CRM systems. Figure 3 illustrates the type of data a socially integrated dashboard and CRM system can report.

Organising for social media

Companies taking an integrated workflow approach typically design teams to manage the complex nature of social media with one of three basic organising models:

- *Co-ordinated* – One team or department has overall responsibility for social media but liaises closely with other areas to co-ordinate their activities.
- *Single team* – A specific team or department is created to deliver all aspects of social media engagement, including web, marketing and customer service.
- *Embedded* – different groups in the business operate in a self-directed manner, but co-ordinate where required.

There is no definitive answer to which of these team organisational descriptions is more appropriate or effective. However, all are reliant on a level of interaction enabled through engagement dashboards. If all team members do not have the capability to view and action allocated items, this can lead to errors, duplication or inconsistency in responses and customer interactions.

Conclusion

The growth of social networks and the deluge of social media conversations have created the need for software platforms to manage the processes of

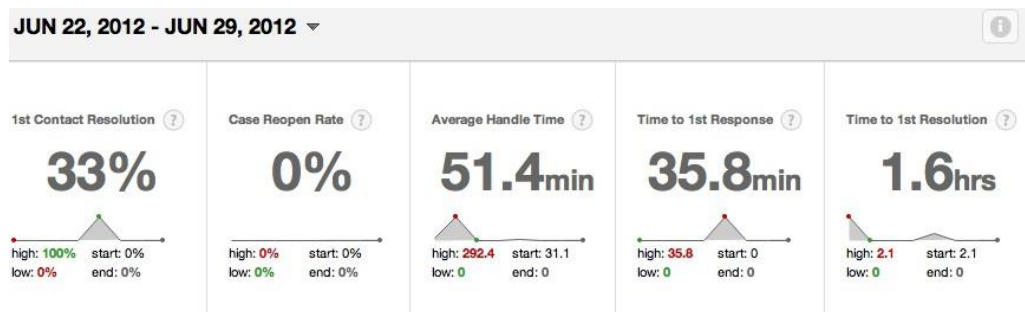


Figure 3: Service results

monitoring, engaging and analysing social media data. To respond to this need, the social media dashboard has evolved as a must-have tool for businesses to effectively gain value and measure ROI from social media campaigns and ongoing engagement through social channels.

The chapter has overviewed key components of dashboards and aligned these to the levels of social media maturity within organisations. While this chapter has not conducted a full technical review of the many products available, a number of popular platforms have been mentioned to provide context for the reader to understand and recognise the varying capabilities.

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Chapter 6: Reporting outputs from dashboards – From clicks to insight

By Anne Bartlett-Bragg

THE PREVIOUS chapter focused on the use of social media dashboards from an operational perspective. In this chapter, a review of using dashboards to report social media analysis is approached from a business or social intelligence perspective, progressing the use of analytics dashboards for measurement into reports that inform insight. That is, using the results to provide brand insight which can inform future product or service directions and how best to leverage social media activities to enable those directions. In addition, the role of a social media analyst is discussed and an interview with a current practitioner offers a view to the importance and future direction for this type of role in the organisational structure.

One of the big predictions for 2012 has been the expectation that brands will use the extensive social media data available to optimise their approach by focusing on insights, rather than basic measurements, to create actionable social strategies. Yet, when reviewing the stages of social media maturity across brands globally and the basic use of dashboards, layered with some of the complexities encountered when measuring social media sentiment and influence, it is not surprising to predict this notion will not gain wide levels of implementation, in the short term.

In the past, digital marketing has relied heavily on 'click' measurements to determine the impact of campaigns. As discussed in the

previous chapter, this form of measurement has been easily transferred to social media by looking at the number of followers (or new followers attained through a campaign), number of likes on Facebook, and number of posts, rather than levels of engagement with customers. However, it fails to take into account the fundamental difference between social media and digital activities. The underpinning social media principle relies on participation with others, whether that is between a brand and its customers, or people engaging directly with each other about a brand.

Consequently, listening and engaging directly on social media platforms requires a shift from reporting click activity to reporting engagement levels and the additional appreciation of customer sentiment, engagement and feedback to the brand.

Some of the different types of data currently being reported through analytics dashboards were outlined in Chapter 5. At the same time, many of these data sets could be used by social media analysts for evaluating actionable business insights, through identification of either an opportunity in the market, or a need for a shift in marketing focus.

For example, if the dashboard indicates a high level of engagement with adults but not with seniors, is there an opportunity to extend engagement to seniors (currently, the fastest growing demographic on the internet)? What change in engagement strategy would be required to achieve this?

Using a monitoring dashboard, real-time feedback will enable tracking of the effectiveness of the new strategy daily, or as required, to make adjustments to further engage with the target group. An analytics dashboard will detail results over a period of time and can be set to produce comparative results to measure effectiveness of reach.

Fundamental to social intelligence and development of actionable social media insights, two features of social media analysis to highlight, both mentioned in the previous chapter, sentiment and influence, are considered essential for understanding context and how to engage effectively with target audiences. To date however, analytics dashboards have not achieved automated algorithms to report either accurately. Some of the challenges are outlined below.

Sentiment

This provides a pulse rate for a brand, more quickly than any traditional market research focus group, so a brand can gain insight into customer reactions in real-time.

Sentiment provides the opportunity to quickly adjust campaigns or a service delivery mechanism, without continuing along a costly strategy of post-campaign or monthly service level reviews.

Automated sentiment analysis has improved greatly in recent times. Nonetheless, for deep insight, not a quick pulse check, a social media analyst would be required to manually review and update sentiment that reflects contextual effects, sarcasm or other unidentified external conditions.

Influence

As discussed in Chapter 5, the influence of an individual in the social media context is a highly sought after metric. To date, there remains no single, agreed formula for how this can be calculated. Nor is there agreement

as to how influence can be correlated to actionable results for a brand's social media strategy. The only point of agreement appears to be that individuals with social media influence are highly desirable for brands to leverage within their social media strategies.

Key considerations for understanding influence include: reach, authority, relationship with followers, levels of activity and engagement with followers, social networks used, and semantic analysis of topic contents.

Reach

Simply determining influence by the number of followers or friends in a particular social network does not effectively determine how many people are reached or influenced by an individual posting a comment, photo, video or response.

Questions to consider may include: who are the followers, are they of value to a brand's social media engagement framework, and are they a segment of the intended target audience?

In addition, reviewing a single social network profile does not provide the full social graph of an individual. A thorough review across all social profiles will enable a deeper understanding of an individual's ability to reach and influence others.

Authority

Appreciating the level of knowledge or experience an individual has in a particular industry or topic, provides insight into their level of authority or their right to have an opinion within a context. Industry thought leaders, who actively share their knowledge, are likely to have followers who are interested in or trust their points of view.

However, not all social media influencers need to be an industry authority to gain levels of engagement with their followers. A powerful personal story, charged with

positive or negative sentiment, shared on a social network, can easily override the level (or lack) of authority.

Relationship with followers

This is a strong indicator of influence, but a difficult one to determine by simply viewing a person's social profile. There is more depth available to view relationship strength and influence by examining content and how this is shared amongst a social network and whether it extends beyond into other social networks.

There is interesting work being developed in this field, based on social network analysis, which will add a valuable dimension when determining influence (see 'Social analytics 2.0' later in this chapter).

Levels of activity and engagement with followers

Influence measured by the number of posts made by an individual is a flawed metric. There are people who generate enormous amounts of posts or content to social networks that may not be of any value to a brand or their followers. determining levels of activity also requires understanding the context and type of content, and which of these influence an individual's followers. There is a direct connection between levels of activity and relationship with followers to appreciate when a post is considered valuable.

In addition, a brand would be advised to track its most active followers, that is, the people who regularly engage directly with the brand. Their level of influence, as interpreted by their followers, with a specific brand can be related to their level of interaction with the brand, not with their followers.

Social networks selected

As mentioned under the sub-heading 'Reach', a full review of an individual's social graph will provide insight into their level of influence both

across their entire connections and on specific platforms. This would also need to take into consideration which social network is valued by the brand and its strategic approach.

Semantic analysis of topic contents

Analysing the topic contents of posts provides insight into the type of influencer someone may be, and can provide an indicator for customer satisfaction. For example, a person who complains on Twitter about a brand's customer service may have a genuine complaint. Yet an analysis of recent posts and topics may reveal that all their posts are related to complaints to many brands. Followers may interpret this as someone who is constantly complaining and holds little weight when griping about an experience they are familiar with, or they may view the person as a social crusader who is using Twitter as a platform to make a brand publicly accountable for poor service. Without a semantic analysis of the context, a brand could mistakenly make invalid assumptions about the influence of this individual.

As highlighted above, to make judgements about an individual's level of influence for a brand would require varying algorithms to measure and put weighting on relevant elements. This is not currently achievable and in many instances is still being manually evaluated by experienced social media analysts.

To gain value from social media dashboards, reporting daily, weekly or monthly operational activities provides the ability to demonstrate success (or not) of social media strategies against business objectives. Notwithstanding operational reports, to fully substantiate social media ROI, and even additional business value, using analytics dashboards for insight will contribute the greatest significance for social media engagement.

Future directions – What's next?

Gazing into the social media dashboard crystal ball is not an easy assignment for even the most experienced futurist, with two competing elements involved. Firstly, the rate of social media adoption, and new platforms or social networks being released almost daily, has an impact on user behaviour and subsequent social engagement strategies being deployed by organisations. While some people are predicting social media fatigue and quote slow downs or reductions in numbers of new users of networks like Facebook, this can be quickly dispelled with the rise in popularity of newly released social platforms like Pinterest or Instagram.

The second element influencing social media dashboards is the level of maturity within organisations and providing features and functionality to meet the needs of business objectives. The demand to be able to interrogate and understand social data is constantly being discussed across industry media as more emphasis is placed on ROI from social media strategies. Companies will need their social media dashboards to provide more sophisticated ways to monitor, engage with and analyse their actions and customer behaviour.

A number of new developments are already emerging: bundled dashboards, social media control centres, predictive analysis, analytics 2.0, and a new business role – the social media analyst.

Bundled dashboards

There have been significant changes in social media dashboards over the past 12 months, with both acquisitions, for example, the acquisition of Radian6 by Salesforce, and major upgrades to functionality being released.

Across all three categories of dashboards, enhancements to features and functionality indicate inclusion of aspects that

provide the user with a more encompassing product. As the acquisitions take effect, it is becoming more evident that a single provider will be able to bundle offerings that include the ability to handle multiple social media accounts, multiple languages, workflows and CRM capabilities, with open application programming interfaces (APIs) that will further integrate the dashboard into other existing enterprise solutions.

Social media control centres

The social media control centre is emerging across a number of sectors, from large organisations with multiple brands, products or services, to not-for-profit organisations and public services, to large scale sporting events. The concept is to establish a team of skilled people, equipped with a series of dashboards enabling monitoring, engagement and analysis of large quantities of social media conversations across a wide range of social channels in real-time, and deep analysis with insights in elapsed time.

Examples include American Red Cross, which installed a command centre to provide real-time information to relief workers and affected people during the recent 2012 tornado season in North America.¹ Edelman digital has launched a social intelligence command centre in Chicago combining monitoring, engagement, analytics dashboards, a live cable TV newsfeed, video conferencing capabilities, and a content production component. The inclusion of content production allows the team to quickly distribute insight and analysis communications in real time.²

All the social media control centres report the integration of multiple social media platforms to ensure full monitoring and engagement coverage, and deep analysis of data, while being able to report in real-time to emerging trends.

Predictive analysis

Predictive analysis is not a new concept to marketing or economics, but is a relatively untapped area in social media. However, as the demand grows for greater insight into social media channels, the ability to connect concepts and trends is being included in analytics dashboards. Some platforms are already suggesting links between related content topics, analysing data from individuals' posts to understand what other topics are frequently mentioned. Connections between people and levels of influence are being tested by a number of platforms, but still require some degree of manual interpretation by a social media analyst.

Forrester expects that analytics dashboards will provide more capabilities in a range of predictive analysis data sets, proactively alerting users to changes in sentiment or other departures from usual results, including probable reasons, as more data becomes available and algorithms develop automated tools for reporting.³

Social analytics 2.0

Social analytics 2.0 is about relationship centred metrics rather than activity and content analysis, where the intention is to expose the relationships between the people

responsible for this content and activity.⁴

Additional industry commentary is relating this type of relationship to understanding beyond current influence scores based on number of followers and popularity. To date, there are sparse offerings across social media dashboards for this type of data.

Social media analyst –

The emerging role

Although analysts in business intelligence positions is not a new concept, the role of a social media analyst is an emerging need within organisations wishing to leverage the insights gained through social channels. A recent article in the Australian Financial Review looked towards people with mathematical backgrounds to conduct deep data analysis,⁵ but with perhaps a broader perspective that incorporates business and economics. disappointingly, there is no reference to the social, people skills required to interpret patterns of behaviour that are studied by sociologists, anthropologists, social psychologists and communications specialists. The interview with a current social media practitioner in this chapter provides an alternative view into how this role may evolve.

An interview with a social media practitioner

Scoping out the new role of a social media analyst, questions arise regarding who is best suited to be actioning the data from social media dashboard reports. Is it a brand or marketing analyst? Someone experienced at interpreting raw data, while being able to drill through the numbers to uncover insight that influences brand enhancement? Or is it someone with a more statistical analyst background, who has experience reading charts and graphs for trends?

To provide an appreciation of the emerging role, deb Wiseman, senior manager social business for Headshift Asia Pacific, discusses her background experiences and how these have informed how she approaches the task of developing insight from dashboard reports. She also shares her thoughts on future directions for these types of roles, inside organisations or within consultancy firms or agencies.

Tell us about your background

I started working in a media agency, on advertising placements for campaigns across all channels. Then I moved to New York and I began working in the industry at a time when social media and more developed online marketing was starting to be included in the mix.

during this time I gained a better understanding of the potential of these channels, as well as a more flexible consumer driven market, which allowed me to see more options than my more traditionally trained counterparts.

After several years in the media industry I moved back to Australia and joined an analytical company, Media Monitors, which measured and tracked media mentions and placements on any topic on any channel, whether traditional, online or social. Working here I realised the increasing importance of combined analytics as opposed to siloed measurement.

Now I'm back in a more communications driven role, and I use my analytical abilities to guide many decisions and insights.

How would you describe the role of a social media analyst?

A social media analyst draws insights and trends from chatter in the social sphere. They look for patterns and trends that brands may never have realised existed. They are turning chatter into actionable insights.

The role requires a few different capabilities, such as:

- Being able to distil and filter the right information/data. There is a lot of data and it is important to be able to pre-select and discard potential data sets that are not relevant to your analysis.
- The ability to cut and shape data in order to draw patterns, trends and insights.
- Understanding what patterns and trends are important to a business and reporting on these with suitable actions if required.

How is it different to traditional marketing analyst roles?

Marketing analyst roles tend to look predominantly at market conditions and how these impact a business. Typically, this information comes from market knowledge, reports and press releases.

A social media analyst will access that data but will also use current market conditions with a pulse from the actual customer who is on the ground interacting with a brand through social media channels.

Real-time searches and feeds provide live data for a social media analyst to be able to associate immediately with market conditions. This is very different to a traditional analyst role that is frequently completed in hindsight, in a sense a more static approach.

What are the core skills needed in this role?

A social media analyst almost needs to be a 'jack of all trades', both a generalist and a specialist. In this role it is important to have attention to detail but still be able to look at the bigger picture.

The analyst needs to understand a business in a larger scale of operations and apply these to the potential permutations in which a customer can interact. But the social media analyst also

needs to be able to look at these issues the other way round. They need to have the ability to look at the small day to day occurrences, the social chatter, and draw out those things that are impacting the business and can be addressed on a customer facing level.

Strategic analysis skills are also important, looking at data over time (for example, a week or a month) and drawing relevant insights and trends that are important to the business. Not only in social media interactions, but real world events that can impact these social media interactions. This means you need to be a problem solver and find the rationale and reasons as to why something could be the way it is.

Having a finger in all these pies means the analyst must have excellent time management skills. You are watching various different sources, so keeping track of them and maintaining their relevance to the business can become overwhelming.

How do you see the role developing or changing in the next five years?

The job itself is certainly one sided at present. A huge focus is purely on the social media aspect when real world events are the events actually impacting these experiences.

In the future the connection between real world events (for example, press releases, market conditions, corporate news and environmental conditions) and social commentary will need to be assessed in the same category.

A social media analyst will become an analyst with a specialist understanding of how online behaviours influence offline business operations and all factors/variables will be assessed as a whole when conducting relevant data analytics.

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Chapter 7: Managing change when introducing social media

By Lee Hopkins

INTRODUCING SOCIAL media into an organisation is fraught with danger, particularly because the foundational ethos of social media – truth, trust, transparency and accountability – may be foreign to it. Existing processes are threatened by social media’s introduction, people are threatened by it, even the organisation’s culture itself is threatened by social media.

If an organisation wishes to engage effectively in the social space, it needs to manage change within the organisation at all levels – senior, middle and operational.

This chapter discusses what change management is, then focuses on how to manage the changes that social media brings to and enforces upon an organisation.

Planned and unplanned change

There are two types of change: planned and unplanned. Planned change is when someone, usually a change agent, enacts a specific set of efforts. Planned change is often a direct response to a perceived performance gap, a reaction to a problem that needs resolving or the result of the discovery of an opportunity to be explored. Usually planned change is enacted by managers in a logical, thought-out manner.

Unplanned change is something prompted by an external driver, such as market forces, economic crises and opportunities, or social change. Typically, organisations react quickly to these

prompts, seeking to minimise any negative consequences and maximise any possible benefits.

Forces of change

Just as there are two types of change, so there are two ways that change can visit an organisation: from internal sources and from external sources. Internal forces of change include such events as a change of ownership, changes in the products or services of the organisation, changes to processes and changes in the measurements of effectiveness. Internal changes are not so obvious to the outsider and are sometimes kept quiet by management so as to not alert competitors or the marketplace.

External change often causes quick reactions from an organisation’s management. External forces for change include politics (for example, a change of government or a change of policy), legislation (for example, anti-spam legislation), markets (for example, foreign companies entering the home market) and technology (for example, the convergence of technologies and the ubiquity of smart phones).

Cultural change

Organisational culture is the pattern of an organisation’s shared beliefs, values, expectations and assumptions. Another way of expressing it is, “It’s how we do things around here.”

An organisation’s culture has a strong influence on a person’s thoughts and

behaviour, and culture affects all elements of an organisation and its operations. The culture itself can significantly impact upon any change initiative, either in a positive way or a negative way, so that it must be taken into account in change processes. But have no fear, even the most rigid of cultures can undergo significant change in the right circumstances.

Professor Pasquale Gagliardi recommends the following approach to culture change:¹

1. Educate stakeholders as to why change is necessary;
2. Communicate the new culture that is desired;
3. Use value statements to embed the new cultural requirements;
4. Give people the skills, knowledge and capabilities they will need to work differently;
5. Create processes, systems and ways of working that enable people to put the new values into practice; and
6. Use performance management and rewards to enforce desired behaviours.

Change can happen at different paces. New companies can experience rapid evolution of organisational culture as they stretch and grow at a consistent pace. Established companies move at a sometimes seemingly glacial pace; they tend to approach change in a more structured and slower pace. Established companies may not seek change until it is forced upon them by a merger or acquisition, or until adverse media attention or (and this is where social media comes in) undeniable changes in the business and social environment.

Technological change

Companies are more open to change wrought as a result of technological

innovation; it seems that employees expect things to change at work when they see the world around them changed by technology. Similarly, managers and leaders are (or at least should be) very aware of the constant, rapid technological changes taking place in their industry and in the business and society around them.

When Apple released the iPad and it was so rapidly adopted by CEOs, IT departments around the world found themselves having to rapidly rethink how they approached network security. Anecdotally, the CEOs picked up an iPad on the weekend and came into work on Monday asking the CTO or CIO to get them 'hooked up' to the network so they could read their e-mails and documents at home on their new toy. Network IT protocols that had been carefully created in order to protect the 'jewels' of the organisation had to be rapidly rethought and reconfigured to allow the insecure iPad secure access to the data behind the firewall.

Change leadership

Most change initiatives, especially radical and unplanned changes, require effective leadership – not just from the senior executive team, but from leaders at all levels of the organisation.

Recent studies into effective change leadership show that change processes that go on to have workforce support have key elements: good leadership, an appropriate change model, room for negotiation and compromise, and well-planned communication.

Many recent Australian studies into the public sector have found that a prominent and active CEO was important if the change initiative was to succeed with the workforce.

Successful change management consultant Robert Miles has summarised

the leadership of change in the following terms. First and foremost, radical change (the sort of change that social media introduces into an organisation) must be vision-led. Few are better than the CEO for epitomising, living and articulating that vision. The vision itself must stretch the organisation and its capacities beyond its current horizon.

Secondly, Miles argues that for a successful change initiative there must be a total system view,² where all major elements of the organisation must be not only included in the change, but carried forward by it.

Thirdly, Miles argues that for a change initiative to be successful there must be sustained organisational learning taking place, so that people and processes begin and continue to develop simultaneously and in harmony.

Miles provides a four-step framework for planned organisational change leadership:

1. Generating energy for transformation:

- Confront reality;
- Create and reallocate resources;
- Raise the bar; and
- Model desired behaviours.

2. develop a vision for the future:

- Visioning process;
- Model business success;
- Analyse the total system; and
- Focus on the transformative initiatives.

3. Align the internal organisational context:

- Restructure;
- Implement infrastructure;
- Reshape the culture; and
- Build core competencies.

4. Create a transformation process architecture:

- Education and involvement mechanisms;
- Co-ordination mechanisms;
- Feedback and communication mechanisms; and
- Consulting support.

All four processes reflect and feed back on themselves and with and among each other.

Any leader-directed, planned change initiative needs to aim for eight targets:

1. Purpose – To clarify or create a mission and objectives;
2. Technology – To improve equipment, facilities and work flows;
3. Structure – To update organisational design and co-ordination mechanisms;
4. Tasks – To update job designs for individuals and groups;
5. People – To update recruiting and selection practices, or to improve training and development;
6. Culture – To clarify or create core beliefs and values;
7. Strategy – To clarify or create strategic and operational plans; and
8. Objectives – To set or modify specific performance targets.

Sometimes these targets for change are approached by management with fad solutions that promise much but fail to take into account the real situation and the people involved, and so end up failing to deliver. However, it is far better to address problems systematically and thoroughly, than to rely on questionable quick fixes.

Furthermore, change managers must recognise that the above targets are *highly* interconnected. For example, a change

in what the organisation does (its tasks) will almost always be accompanied by a change in technology (how it does those tasks). Changes in tasks and technology usually require changes in the structure of the organisation, including changes in authority structures and communication patterns, as well as changes to the roles of those impacted by the change (usually, just about everyone in the organisation in some form or other).

These technological and structural changes, in turn, necessitate changes on the part of the organisation’s members. They may need to develop new skills, for example, or acquire new knowledge in order to perform their changed roles and work with the new technology.

Phases of planned change

Famous psychologist Kurt Lewin recommends that change be viewed as a process that crosses three phases: unfreezing, changing, and refreezing. Figure 1 shows an expanded version of this process. Let’s look at each of these elements in turn.

Unfreezing

Unfreezing is preparing for change. It involves recognising that existing attitudes and behaviours are no longer relevant or appropriate, and it involves creating a need within the organisation for something new.

Many factors feed into unfreezing: environmental changes, declining

performance, awareness of a problem in how things are currently being done, and knowledge that someone else (a competitor, perhaps) has found a better way of doing something. Many change initiatives fail because situations were not properly unfrozen at the start.

Conducting a force-field analysis is a useful way of identifying the forces ‘for’ and ‘against’ change at the start of the unfreezing process. Force-field analysis is a management technique for diagnosing and encouraging change. It is based on the idea that in any situation there are forces, both driving and restraining, that influence potential change. Examples of drivers are supervisor pressure, incentive earnings and competition. Examples of restraining forces are apathy, hostility and poor equipment. In a static environment (in other words, one where no change is occurring), the forces of restraint and drive are equal; what a force-field analysis does is identify the forces, identify which ones can be changed, and weigh those forces based on the degree to which they can be influenced and the likely effects of that influence. Table 1 shows a template you can fill in.

Changing

Changing is the stage where management takes responsibility to modify a situation – that is, change people, change tasks, change structures and/or change technology.

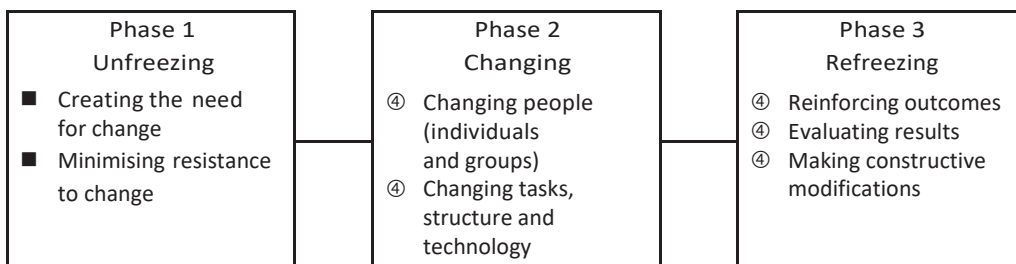


Figure 1: Lewin’s three phases of planned change

Current situation:	Preferred situation:
driving forces:	Restraining forces:

Table 1: Force-field analysis form

The danger that organisations face is that they enter this stage too soon, before unfreezing has cemented itself into the psyche of the organisation. Equally, there is the danger that managers change too many things too quickly, causing chaos rather than positive change. The danger with such an approach is that motivation for change quickly turns to resentment and resistance, in an environment that is not sufficiently unfrozen.

There are two distinct forces that act on people. Firstly, there are the forces within the individual – their openness to change, their belief in the need for change, their motivation to change, and so on. Then there are the external forces alive within the organisation – the type of leadership, the culture, the climate of the organisation, and so on. Add to those the perceived consequences of success or failure within the organisation – is ‘failing’ a career-limiting move? Is ‘success’ recognised and rewarded? The combination of all of these factors affects a person’s degree of felt

security. That is to say, if the degree of felt security by the individual is either high or low then the efforts to bring about change will most likely fail. Why? Because if people feel secure in their work, what incentive is there for change? Similarly, if their degree of felt security is low, anything done to disturb that low state will be seen to be highly threatening.

Only when an individual is in the middle range of felt security will the response to change most likely be positive.

This change stuff is complex, isn’t it? That’s why change consultants get paid so much and take so long – there are so many factors to get right if the change initiative is to have its best chance of success.

Refreezing

Refreezing is the final stage. It is in this stage that the momentum of change is maintained, the stage wherein desired behaviours are reinforced repeatedly. Again, it is not a stage to take lightly. Many a change initiative has been abandoned or derailed at this point

because not enough attention was paid to continual positive reinforcement of desired behaviours and restatement of the values and goals.

A thought on change resistance

Before you put down this report and believe that resistance to change is a natural human state (nearly all of the academic literature would have you believe this, as would much of the banter of change consultants), I encourage you to think a little deeper.

People do not resist change in an outright manner. Many people welcome change and recognise its necessity, but still go on to resist it. Why?

There are some who argue that it is not ‘change’ that people are afraid of, but the change process. In other words, what the change means to them in terms of job security, income, benefits, job status, career prospects, employment prospects and so on. In other words, they do not fear change itself, just the change management process.

If employees are resisting change, perhaps management has not done a good enough job of helping them see the need for change, its relevance and how it will positively affect each individual.

It is okay to say you do not know the answer to how introducing social media will

affect someone’s career or job prospects (for example). Social media is still a very new intervention in corporate life, the bugs are still in the system and not everything is worked out yet. So it is okay to say the future is still a work-in-progress. Better to say you do not know than to make some nonsense up and inflict it on your organisation’s employees. Remember the ‘Three Ts and an A’: employees want truth, not some spin that someone somewhere believes will appease them. In truth, that spin will just reduce the trust that people have for you, the social media team and the organisation’s management. Be honest and truthful about what implications the introduction of social media will have for them. Give them the best knowledge you have, but don’t make stuff up.

Planned change strategies

When introducing change into an organisation, there are traditionally four methods used: top-down, force coercion, rational persuasion and shared power – see Table 2. Let’s look at each in turn.

Top-down

Think of the military; this is how the top-down approach works. Someone or a group at the top of the chain gives a command, and the rest of the organisation is expected to follow.

Change strategies	Managerial behaviours	Predicted outcomes
Top-down	Authoritarian directives; one-way communication	Frustration and annoyance
Force coercion	Unilateral action; ‘command’	Temporary compliance
Rational persuasion	Expert testimony; demonstration projects	Long-term internalisation
Shared power	Empowerment; participative decisions; group process	Longer-term internalisation

Figure 2: Change strategies, management behaviours and predicted outcomes

The challenge with such an approach is that top management does not have a monopoly on expertise and information about the need for and requirements of change. Lower level managers and employees at the coal face are often closer to the environment than the leadership team, and thus more able to add valuable perspective about the customer, the marketplace and the changes being sought by management.

There is a plausible reason why top-down change approaches so often fail: low-level employees are very often struggling to assert their own independence and autonomy. Exercises in top-down exertion of authority merely engender an equal and opposite reaction as the employees assert their own autonomy.

Force coercion

A force coercion strategy uses rewards and punishments as primary ways of engendering change. The change agents use the 'power' of their position to 'command' compliance, using carrots and sticks to get their way. Of course, such an approach only ends up creating short-term compliance, through either fear of retribution or the desire to gain a reward. As soon as the change agent loses their authority, or the sticks and carrots fade from obvious view, employee behaviour will revert to its previous position.

Rational persuasion

A rational persuasion strategy attempts change through the use of special knowledge, rational argument and empirical support. The underlying assumption with this strategy is that people will be guided by reason and reasoned argument, as well as self-interest. 'Experts' are often called in to demonstrate the cost-benefit value of the proposed change and how the change will leave employees better off than before.

Shared power

Some of the best approaches to change put strong emphasis on getting all parties affected by the change involved in the process. Letting all parties be involved in shaping the change initiative gives everyone the opportunity to express their ideas and concerns, even their frustrations. This approach builds essential foundations such as common values, group norms and shared goals. It is a 'high touch' approach which, because of its democratic, inclusive nature, can take longer to reach agreed-upon outcomes, values, methodologies and processes. The flip side of that is that the change, when it arrives, is very likely to be longer lasting and more deeply internalised.

So, with these four strategies in mind, what is the 'best way' to bring about change?

It turns out that there is no one 'best way'. While everyone agrees that getting everyone affected by the proposed change around the table and giving them time to air their concerns is the best way for engendering long-lasting change, sometimes organisations do not have the luxury of large chunks of time to devote to it. A competitor might just have released a killer product or service and the organisation's revenue is being hit hard. Or a new piece of legislation has just changed the business landscape and the organisation must react immediately.

What change approach works best depends on each situation at that time – the law, the culture of society or the marketplace, impinging government policies and practices, time, competitor activity. Be prepared to use any or even all of the change strategies as the situation demands.

Organisational innovation

In order to survive and thrive, organisations need to build in processes and capabilities

Guidelines for effective change When thinking about introducing change, keep the following in mind:

- Consider using an expert consultant;
- Communicate the need for change;
- Gather as much information and feedback from employees as possible;
- do not fall into the trap of change for change's sake; and
- Study organisational change, including new forms and structures – there are plenty of resources available on the internet.

to handle change. Usually, this means continuous innovation.

Whilst innovation comes in many forms, most commentators define innovation as the creation of new or improved products and services.

The best organisations are able to innovate on an ongoing basis – the best managers helping their staff use their talents to the fullest to create new and exciting innovations. These managers must bear responsibility for continual improvement *and* the application of the improvement.

A formula could express it thus:

Innovation = invention + application

Invention is the act of discovery, while application is the act of use. There is little benefit to discovering a new, more cost-effective way of doing things if that discovery is not then acted upon and brought to life.

The innovation process

There are four main steps involved in a typical organisational innovation:

1. Idea creation – The gathering of new product or process ideas that arise from spontaneous creativity, ingenuity and information processing;
2. Initial experimentation – The examination of new ideas in concept to establish their potential application and value;
3. Feasibility determination – The conducting of formal studies to determine the feasibility of adopting that new product or process, including a cost-benefit analysis; and
4. Final application – Producing and marketing the new product or service, or fully implementing the new process.

It is obviously essential that any new product or process offer tangible benefits to the organisation, or to the marketplace.

So, if your new social media initiative does not offer direct or trackable indirect benefit to the organisation, enough that senior management are happy to sign off on the expenditure, then your social media initiative is not innovative enough and will likely meet resistance from various parts of the organisation.

Social media and change

Before you begin to introduce social media into your organisation, take the time to watch an excellent presentation by Michael Murray, in which Murray gives an excellent holistic view of the change process as it applies to social media. You can find it at bit.ly/LdTiH7. Murray goes into more depth in an article on the well-read blog, *Social Media Strategy*, available at bit.ly/NjMKI3.

Mohsin Ghafoor and Trinity Martin have written an excellent article on the Outlook site, the online journal of high-performance business, in which they take a slightly different approach to the interaction between social media and change. In 'Six ways social media technologies accelerate large-scale change' (available at bit.ly/KeuOsu), they discuss the role of social media as a tool in change management:

"Social media is an important addition to a traditional change management program, one that can dramatically increase the acceptance of change and advance an organization more predictably toward its business goals. Collaboration and social media tools can reduce the time an organization needs to navigate large-scale change programs and deliver a better change experience from the employee's perspective; this, in turn, builds a foundation for employees to be more continuously change capable in the future."

The Outlook site also features an excellent article by Caroline Firstbrook and Robert Wollan on 'Harnessing the power of social media' (available at bit.ly/LbB7rx). As they say,

"Social media is a genuine game changer for business. Companies that invested early to harness the power of social media claim returns as high as 20 to 1, with even greater gains predicted to be on the way. Meanwhile, those on the wrong side of this customer-driven uprising have already learned the hard way how quickly brands and reputations can be built – or destroyed – by this phenomenon."

Looking at such areas as marketing, business intelligence, sales, innovation and customer service, the authors give real-world

examples of how social media can impact on an organisation's activities. Mark W. Schaefer has collated five case studies from a McKinsey report ('Social technologies on the front line', available at bit.ly/KStuJT), showing how resources can be shared more efficiently, global training can take place with local experts, and how social tools can be used for new product development, amongst others. The case studies are short and well worth the read to further confirm that real-world companies are using social tools to good effect.

On video site Vimeo, Lisa Thurber, Walmart's web/digital communications senior manager, shares how the company engages with massive audiences internally using social media (available at vimeo.com/23237342). Entitled 'Using Social Media for Change Management', the 25-minute presentation was filmed at the BlogWell conference in 2011. One of Thurber's big ideas is that transparency, relevancy and consistency are the key to internal social communications.

Conclusion

Introducing social media into the organisation does not have to be a task fraught with difficulties. But it will involve changing the status quo of some of the organisation's processes and will impact on the comfort levels of some of the organisation's people.

There is no one best way to introduce that change, but studies show that the more involvement a wider range of people have in the project, the greater the chance of a successful outcome. It might take a little longer to get there, but the results are longer-lasting.

Use the case studies provided as evidence that you're not going into an unknown jungle, and that others have gone there before you.

A cautionary word on case studies

Reading case studies is great – it gives one confidence to see that other organisations have faced similar problems and found solutions. Case studies give us examples to show senior management, to prove that we ‘didn’t pull all of this out of thin air’. It also gives us something to expect if we follow their path.

But there are caveats that need to be considered, too, as Amber Naslund explains in the following excerpt from her blog post, ‘Are Case Studies Helping or Hindering You?’, reproduced here with kind permission. The full post can be found at bit.ly/MIcHzl.

Amber Naslund on the danger of case studies

It’s really important to recognise the limitations of what ‘best practices’ and ‘case studies’ can actually provide to you as a business, or as someone responsible for making decisions for yourself or your company.

1. No company is your company. No matter how similar the programme or initiative, the inner workings of someone else’s business – from culture to organisational design to finances and objectives – are going to be completely different to yours. And all of those things affect every bit of a project, from initial risk tolerance to how they determine success or failure and everything they invest along the way. You can glean some top-line similarities, but the details of how they got from point A to point B are always going to be different to yours, which can have a significant impact on outcomes.
2. No one shares every detail. Especially when it comes to the illustrious case study, companies love to share their success stories, or the key details of what made something work. It’s as much a sales and marketing tool as it is a teaching tool, however. You’ll likely not get in there a lot of the ugly bits: the false starts, the budget arguments, the internal culture and political snags, much less how those were resolved. Nor will you get every single data point. It’s very important to realise that you’re looking at an edited view of both process and results.
3. Innovation is not achieved by mirroring patterns. If having a standout success is important to you, if leading your sector or industry into a new era is something you value, then you aren’t going to get there by following in someone else’s footsteps. There’s a difference between improvement and innovation, and we need both. So while case studies can be a great gut check or even a bit of reassurance, to *really* get out there and change the game, you’re going to have to create your own way of doing things and be your own case study.
4. We can limit our perspective too early. This is actually pretty basic psychology, and can be hard to overcome unless you’re paying really close attention. Surrounding ourselves with pictures of what other people have done colours our perception about where the boundaries and possibilities are, and what the solutions might be to our challenge. If we’re looking to case studies to set the bar for us rather than help validate a bar we’ve set for ourselves, we might just sell ourselves short.

Business is a set of probabilities, not guarantees. A case study or a set of ‘best practices’ is not insurance. It is merely one point of view.

Social media especially is something that's being touched at a surface level today, but there is so much more, little of which is being documented and shared as how-tos and methodologies. If what you want is a comfortable path to walk, you'll find yourself only able to find examples of some of the most basic – and somewhat superficial – practices that you can adopt and follow.

The true integration of social into business, however, is at the first stages of taking shape. And if that's the direction you hope to head in – before the masses catch up to you – you're going to have to draw your own map. Surely some learnings will emerge, some consistent patterns and successes will take hold, and those can be incredibly valuable. But documenting them, sharing them, analysing them and understanding the drivers? That is a trailing practice, and can only be done after, which means the 'case studies' will necessarily always lag behind the breakthrough progress itself.

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Afterword

ALL JOURNEYS must come to an end, and sadly this one has too. Let's look back at what we have covered in this report.

Chapter 1 looked at the background material you need to be aware of in order to make best use of social media. We looked at why social media has become so powerful and learned about the four foundational ethos of social media – truth, trust, transparency and accountability. We also bumped into the website and book that started it all, *The Cluetrain Manifesto*. We considered why we should even bother measuring social media in the first place, and looked at the RRISC model (reputation, rumours, information, story and customers).

Chapter 2 looked in depth at the most important reason for social media ROI, tying social media activities to real-world business objectives. As Olivier Blanchard says, "Social media activity, in and of itself, is not an objective. Acquiring net new customers, increasing reach, building loyalty, capturing more market share, even increasing net new revenue – these are objectives." We looked at the sorts of organisational units that could most immediately benefit from social media activity: sales, customer service, HR, PR and business intelligence.

Chapter 3 took us into a real-world, working social media strategy document that you can complete and benefit from immediately. We looked at a couple of approaches to help get the important answers out in the open – the 'Five Ws

and an H' approach, and the 'Five Pillars' approach. Once those foundational questions have been answered, there is a strategy formula that can be followed to generate a strategic document that works for you. We also considered whether organisations actually need a strategy (they do) and the benefits of having a strategy, including increased productivity, lowered operational costs, increased worker flexibility, greater knowledge sharing, and enhanced relationship marketing.

Chapter 4 took us down the measurement road. We looked at communications measurement guru Katie Payne's measurement programme checklist, which is an invaluable starting point. We discussed Google's excellent Analytics software, including Avinash Kaushik's must-have guide book, *Web Analytics 2.0: The Art of Online Accountability and Science of Customer Centricity*. We then considered sentiment analysis, and looked at the mountain of data you can measure, including online (and just as importantly) offline metrics. We then wrapped up the chapter with an in-depth look at FRY (frequency, reach, yield) and how it finally brings together the different philosophies of sales and marketing.

Chapter 5, written by Anne Bartlett-Bragg, took us into the world of social media dashboards – what they are, what they comprise, what they can and cannot do. Anne showed us that our dashboards allow us to do many things at once – monitor,

measure, engage, analyse, and integrate with our existing workflows.

Chapter 6, also written by Anne, delved deeper into dashboards, looking at the output, taking us from simple clicks to complex insights. Anne shared the insights of a social media practitioner, as well as what might lie in store for us as social media managers in the not-too-distant future.

Chapter 7 was all about change management, because introducing social media into the workplace is undoubtedly going to cause upheaval. We learned that there are two types of change – planned and unplanned – and social media can fall into both camps, but only one of them is easy to manage. We looked at cultural change, technological change and overall change leadership. A force-field analysis form was provided so that change agents and managers can work through potential landmines in advance. Finally, we looked at organisational innovation and more extra case studies.

So there we have it: the business case for social media in your organisation, and what to say to those who think social media is ‘a time-wasting fad’. There are real-world business outcomes that can be positively affected by social media and the social media manager can justifiably hold their head up high when asked if they are contributing to the bottom line.

Venture forth into your organisation with confidence and let me know how you are getting on. You can email me at: Lee@bettercommunicationresults.com.au.

Good luck!

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