

# SOCIAL MEDIA MARKETING



## 2 Social Media Marketing Strategy

### LEARNING OBJECTIVES

When you finish reading this chapter you will be able to answer these questions:

- 1 Where does social media marketing planning fit into an organization's overall planning framework?
- 2 What are the phases of social media marketing maturity? How does social media marketing change for companies as they shift from the trial phase to the transition phase and eventually move into the strategic phase?
- 3 What are the steps in social media marketing strategic planning?
- 4 How can organizations structure themselves to support social media marketing?
- 5 What are the key components of an organizational social media policy, and why is it important to have such a policy in place?

## Strategic Planning and Social Media Marketing

Honda is buying into social media, big time. The company has strategically utilized several different social media channels and vehicles in recent years and coordinated these with more traditional tactics like paid broadcast media to maximize impact. The company has an active presence in social communities like Facebook and Twitter, but also runs targeted campaigns on niche community networks like Vine and Pinterest. Honda partnered with Salesforce to manage its social media activity and ensure it could be responsive with fans around the world who use social media to reach out to the brand. We'll hear more about Honda's approach to social media marketing in this chapter.

For marketers like those at Honda, **strategic planning** is the process of identifying objectives to accomplish, deciding how to accomplish those objectives with specific strategies and tactics, implementing the actions that make the plan come to life, and measuring how well the plan met the objectives. The process of strategic planning is three-tiered, beginning at the corporate level, then moving to the business level, and lastly moving to the functional areas of the organization, including marketing. Planners first identify their overall objectives (e.g., "raise consumer awareness of our brand by 10% in the next year") and then develop the specific tactics they will use to reach those goals (e.g., "increase our spending on print advertising in targeted publications by 15% this year"). A **marketing plan** is a written, formalized plan that details the product, pricing, distribution, and promotional strategies that will enable the brand in question to accomplish specific marketing objectives. Table 2.1 provides a sample of an overall marketing plan structure.

Table 2.1 The Structure of a Typical Marketing Plan

THE MARKETING PLAN OUTLINE	QUESTIONS THE PLAN ADDRESSES
A PERFORM A SITUATION ANALYSIS  1 Internal Environment	<ul style="list-style-type: none"> <li>• How does marketing support my company's mission, objectives, and growth strategies?</li> <li>• What is the corporate culture and how does it influence marketing activities?</li> <li>• What has my company done in the past with its: Target markets? Products? Pricing? Promotion? Supply chain?</li> <li>• What resources including management expertise does my company have that make us unique? How has the company added value through its offerings in the past?</li> </ul>
2 External Environment	<ul style="list-style-type: none"> <li>• What is the nature of the overall domestic and global market for our product? How big is the market? Who buys our product?</li> <li>• Who are our competitors? What are their marketing strategies?</li> <li>• What are the key trends in the economic environment? The technological environment? The regulatory environment? The social and cultural environment?</li> </ul>
3 SWOT Analysis	<ul style="list-style-type: none"> <li>• Based on this analysis of the internal and external environments, what are the key Strengths, Weaknesses, Opportunities, and Threats (SWOT)?</li> </ul>

**THE MARKETING PLAN  
OUTLINE**

**QUESTIONS THE PLAN ADDRESSES**

B SET MARKETING OBJECTIVES	<ul style="list-style-type: none"> <li>• What does marketing need to accomplish to support the objectives of my firm?</li> </ul>
C DEVELOP MARKETING STRATEGIES	<ul style="list-style-type: none"> <li>• How do consumers and organizations go about buying, using, and disposing of our products?</li> <li>• Which segments should we select to target? If a consumer market: What are the relevant demographic, psychographic, and behavioral segmentation approaches and the media habits of the targeted segments? if a business market: What are the relevant organizational demographics?</li> <li>• How will we position our product for our market(s)?</li> </ul>
1 Select Target Markets and Positioning	
2 Product Strategies	<ul style="list-style-type: none"> <li>• What is our core product? Actual product? Augmented product?</li> <li>• What product line/product mix strategies should we use?</li> <li>• How should we package, brand, and label our product?</li> <li>• How can attention to service quality enhance our success?</li> </ul>
3 Pricing Strategies	<ul style="list-style-type: none"> <li>• How will we price our product to the consumer and through the channel? How much must we sell to break even at this price? What pricing tactics should we use?</li> </ul>
4 Promotional Strategies	<ul style="list-style-type: none"> <li>• How do we develop a consistent message about our product? How do we best generate buzz?</li> <li>• What approaches to advertising, public relations, sales promotion, and newer forms of communication (such as social networking) should we use?</li> <li>• What role should a sales force play in the marketing communications plan? How should direct marketing be used?</li> </ul>
5 Supply Chain Strategies	<ul style="list-style-type: none"> <li>• How do we get our product to consumers in the best and most efficient manner?</li> <li>• What types of retailers, if any, should we work with to sell our product?</li> <li>• How do we integrate supply chain elements to maximize the value we offer to our customers and other stakeholders?</li> </ul>
D IMPLEMENT AND CONTROL THE MARKETING PLAN	
1 Action Plans (for all marketing mix elements)	<ul style="list-style-type: none"> <li>• How do we make our marketing plan happen?</li> </ul>
2 Responsibility	<ul style="list-style-type: none"> <li>• Who is responsible for accomplishing each aspect of implementing the marketing plan?</li> </ul>
3 Time line	<ul style="list-style-type: none"> <li>• What is the timing for the elements of our marketing plan?</li> </ul>
4 Budget	<ul style="list-style-type: none"> <li>• What budget do we need to accomplish our marketing objectives?</li> </ul>
5 Measurement and Control	<ul style="list-style-type: none"> <li>• How do we measure the actual performance of our marketing plan and compare it to our planned performance and progress toward reaching our marketing objectives?</li> </ul>

On second thought, what's wrong with jumping right into the game? Why should we take the time to plan? Although it's tempting to just follow our instincts, it turns out there is tremendous value in planning. Dumb luck and sweat take you only so far. Planning ensures that an organization understands its markets and its competitors. It helps to ensure that organizations are aware of the changing marketplace environment. When organizational partners participate in the planning process, they are better able to communicate and coordinate activities. Planning requires that objectives are set and agreed upon, which improves the likelihood of those objectives being met. It enhances the ability of managers to allocate limited resources using established priorities. Perhaps most of all, planning enables success to be defined. Success or the lack thereof becomes a measurable outcome that can guide future planning efforts.

It's increasingly common for organizations to include a heavy dose of social media in their marketing plans. Nearly all marketers use social media in some way—one survey revealed 97% of marketers use social media.<sup>1</sup> The use may or may not be integrated, but most are. Whether large or small, B2B (business-to-business) or B2C (business-to-consumer), businesses recognize that social media should be integrated into their marketing plans. One study found that 90% of businesses with revenues in excess of \$1 billion felt social media should be an integrated aspect of their marketing.<sup>2</sup> Most are doing so for branding and demand-generation purposes, but social media marketing is also valuable for managing customer service interactions and conducting market research. This upward trend will continue in the coming years.

It makes sense to include social media marketing in a brand's marketing plan. Social media marketing has many applications for marketers. Social media can be a delivery tool to build buzz and word-of-mouth communication. It can efficiently deliver coupons and other special promotional offers. Social platforms can be the primary venue for the execution of contests and sweepstakes. They can collect data to build databases and to generate sales leads. Social media can also serve as efficient channels to manage customer service relationships and to conduct research for new product development. Not to mention, social media are relatively inexpensive ways to increase the reach and frequency of messages that are otherwise delivered via more traditional, big media methods.

Because the creative applications related to social media are somewhat unique, we will suggest an approach for developing an in-depth social media marketing strategy much as advertising plans (also known as [integrated marketing communications \(IMC\) plans](#) or [marcom plans](#)) provide in-depth detail on the execution of the (traditional) promotional portion of a brand's marketing plan. In the early days of social media marketing, many plans were developed for stand-alone campaigns that were not fully integrated into the brand's promotional mix. Today, social media marketing campaigns may serve as stand-alones or be a fully integrated media choice in the brand's marcom plan. For simplicity, we approach the sample plan from the perspective of a stand-alone campaign. Table 2.2 provides the structure of a social media marketing plan. We'll begin this process as we explore the strategic development of social media marketing plans. Then we'll cover the steps in strategic planning for social media marketing. Finally, we'll discuss structural approaches organizations can take to be prepared to execute their plans.

Table 2.2 A Social Media Marketing Plan

**THE SOCIAL MEDIA MARKETING PLAN OUTLINE**

I	Conduct a situation analysis and identify key opportunities
1	Internal Environment
a	What activities exist in the overall marketing plan that can be leveraged for social media marketing?
b	What is the corporate culture? Is it supportive of the transparent and decentralized norms of social media?
c	What resources exist that can be directed to social media activities?
d	Is the organization already prepared internally for social media activities (in terms of policies and procedures)?
2	External Environment
a	Who are our customers? Are they users of social media?
b	Who are our competitors? What social media activities are they using and how are social media incorporated in their marketing and promotional plans?
c	What are the key trends in the environment (social, cultural, legal and regulatory, political, economic, and technological) that may affect our decisions regarding social media marketing?
3	SWOT Analysis
a	Based on the analysis, what are the key strengths, weaknesses, opportunities, and threats (SWOT)?
II	State objectives
1	What does the organization expect to accomplish through social media marketing (promotional objectives, service objectives, retail objectives, research objectives)?
III	Gather insight into target audience
1	Which segments should we select to target with social media activities?
2	What are the relevant demographic, psychographic, and behavioral characteristics of the segments useful in planning a social media marketing strategy?
3	What are the media habits, and especially the social media habits of the segments?
IV	Select social media zones and vehicles
	Which mix of the four zones of social media will be best to accomplish our objectives within the resources available?
1	Social community zone strategies
a	What approach to social networking and relationship building should we use? How will we represent the brand in social networks (as a corporate entity, as a collection of corporate leadership, as a brand character)? What content will we share in this space?

(Continued)

Table 2.2 (Continued)

<b>THE SOCIAL MEDIA MARKETING PLAN OUTLINE</b>	
2	Social publishing zone strategies
a	What content do we have to share with audiences? Can we develop a sufficient amount of fresh, valuable content to attract audiences to consume content online?
b	What form should our blog take?
c	Which media sharing sites should we use to publish content? How should we build links between our social media sites, owned media sites, and affiliates to optimize our sites for search engines?
3	Social entertainment zone strategies
a	What role should social entertainment play in our social media plan? Are there opportunities to develop a customized social game or to promote the brand as a product placement in other social games? Is there an opportunity to utilize social entertainment sites such as MySpace as an entertainment venue?
4.	Social commerce zone strategies
a	How can we develop opportunities for customer reviews and ratings that add value to our prospective customers?
b	Should we develop retail spaces within social media sites? If we socially enhance our own e-retailing spaces, what applications should be used?
c	How can we utilize social commerce applications like group deals to increase conversions?
V	Create an experience strategy encompassing selected zones
1	How can we develop social media activities that support and/or extend our existing promotional strategies?
2	What message do we want to share using social media?
3	How can we encourage engagement with the brand in social spaces?
4	How can we encourage those who engage with the brand socially to act as opinion leaders and share the experience with others?
5	In what ways can we align the zones used as well as other promotional tools to support each other? Can we incorporate social reminders in advertising messages, in store displays, and other venues?
VI	Establish an activation plan
1	How do we make the plan happen?
2	Who is responsible for each aspect of implementing the plan?
3	What is the timing of the elements in the plan?
4	What budget do we need to accomplish the objectives?
5	How do we ensure that the plan is consistent with the organization's overall marketing plan and promotional plan?
VII	Manage and measure
1	How do we measure the actual performance of the plan?

## The Phases of Social Media Marketing Maturity

If you keep up with industry news, you might be tempted to think that *every* brand has a social media strategy. Each day seems to bring new stories about a marketing campaign with social media elements. On ads, storefronts, and business cards, we see “Follow me” calls to action as organizations large and small flock to Twitter and Facebook.

Although it seems everyone is talking about social media, it’s one thing to claim you *use* social media and quite another to say you have a *strategy* that incorporates social media. In the former case, a group can turn to social media activities to stage **stunts** (one-off ploys designed to get attention and press coverage) or as **activation tools** to support other marketing efforts. For example, when Skittles let its social media presence take over its website, that was a stunt. But when Starbucks runs social media promotions, it integrates these promotions with the overall campaign in place.

As organizations develop in their **social media marketing maturity**, they plan systematically to ensure social media marketing activities are consistent with their marketing and marketing communications plans and are capable of meeting specific marketing objectives. By this we mean that as a result of time and experience we tend to see that applications that start as one-time “experiments” often morph into more long-term and carefully thought-out elements that the organization integrates with all the other communication pieces it uses to reach customers.

Nevertheless, many marketers currently use social media marketing tactics without that level of maturity. A major study of marketers in both Europe and North America found huge differences in the level to which respondents use social media and integrate them with their other initiatives. Many still just experiment with baby steps (like creating a Facebook page) rather than include social media as a fundamental component of their marketing strategy.<sup>3</sup> Companies are eager to jump into the social media game, but many are still in the process of figuring out just how these approaches can go beyond the novelty stage and actually help them to meet their objectives. Companies can be thought of in terms of their level of maturity in social media marketing, of which there are three phases: trial, transition, and strategic.<sup>4</sup> Let’s take a closer look at each phase.

### Trial Phase

The **trial phase** is the first phase of the adoption cycle. Organizations in the trial phase test out social media platforms, but they don’t really consider how social media can play a role in the overall marketing plan. In these early days, most groups focus on learning to use a new form of communication and exploring the potential for social media as a venue.

It isn’t necessarily a bad thing to test the waters of social media. Companies need, especially early on, to experiment—to play in the sandbox, so to speak. Doing so helps them to brainstorm ideas to use social media and understand what it takes to succeed in this brave new world. However, the problem with the trial phase is that many companies do not treat it as an exploratory stage of what is really a multi-stage process. Instead they just jump right in and focus only on cool new ways to communicate. Think this couldn’t happen? One estimate suggests that 44% of marketers have been using social media less than two years.<sup>5</sup>



## SHOW ME!



An aeroplane: Chris Parypa Photography / Shutterstock.com



Photo 2.1

British Airways could be thought of as one example of a company that has not fully embraced social media as a key component of marketing strategy. How do we know? Consider this example. A customer of British Airways, frustrated about his lost luggage (using his Twitter handle @hvsvn), posted a “promoted tweet” (that’s paid media in social vehicle) advising people to avoid flying with British Airways due to its horrendous service. The company didn’t respond for eight hours! When it did, it tweeted that customer service hours were standard business hours—9 to 5—and asked that the customer direct message (DM) his baggage claim information to them. What would you think? You got it. Twitter is 24/7. Brands don’t have the option of being on only 8 hours per day.<sup>6</sup>

American has been lauded for its use of social media marketing. Headlines make claims like “How American Airlines Gets Social Right,” “The Secret to American Airlines’ Customer Service Success,” and “AA’s First Class Twitter Strategy.” Sounds good, right? Maybe not. In the transition stage, brands are on the right track but may not have fully formed a strategic approach. We place American Airlines in the transition phase. Why? American Airlines includes automation in its social media response tactics. This means that some of the responses to tweets or Facebook posts (or other social media comments) are programmed. In the industry, these automated responses are sometimes called **bots** or **social media zombies**. In and of itself, that’s not bad. Automation can help brands be responsive. But if overused or used ineffectively, people will know. And they will resent it. This is what happened to American Airlines. Just after the media announcement that American Airlines would merge with US Airways, a Twitter user tweeted a congratulations (of sorts). The tweet suggested that the new merged organization would be, well, less than a traveler’s dream. What did American do? It tweeted (zombie-style) a reply: “Thanks for your support! We look forward to a bright future as the #newAmerican!”<sup>7</sup>

### *Transition Phase*

As organizations mature in their use of social media marketing, they enter a **transition phase**. During this phase, social media activities still occur somewhat randomly or haphazardly but a more systematic way of thinking starts to develop within the organization. An example? Perhaps American Airlines can serve as one.

### *Strategic Phase*

When an organization enters the final **strategic phase**, it utilizes a formal process to plan social media marketing activities with clear objectives and metrics. Social media are now integrated as a key component of the organization's overall marketing plan. As we move forward, we'll share insights from Honda's social media campaigns to show why.

## Social Media Campaigns: The Strategic Planning Process

Those organizations that have moved beyond the trial and transition phases of social media marketing maturity develop strategic plans for social media that incorporate components of the social media mix as channels to accomplish marketing objectives. As we saw in Table 2.2, the process consists of the following steps:

- Conduct a situation analysis and identify key opportunities.
- State objectives.
- Gather insight into and target one or more segments of social consumers.
- Select the social media channels and vehicles.
- Create an experience strategy.
- Establish an activation plan using other promotional tools (if needed).
- Execute and measure the campaign.

### Situation Analysis

The first step in developing the plan is much the same as it is in the creation of traditional strategic plans—research and assess the environment. Good social media planning starts with research on the industry and competitors, the product category, and the consumer market. Once this research is compiled, strategists try to make sense of the findings as they analyze the data in a **situation analysis**.

The situation analysis details the current problem or opportunity the organization faces. It will typically include a **social media audit**. In addition to the standard things marketers

need to know, the social media audit ensures the team understands the brand's experience in social media. In addition, a review of the brand's **SWOT analysis** will highlight relevant aspects of the firm's internal and external environment that could affect the organization's choices, capabilities, and resources. This acronym refers to *strengths*, *weaknesses*, *opportunities*, and *threats* that the firm should consider as it crafts a strategy. The **internal environment** refers to the strengths and weaknesses of the organization—the controllable elements inside a firm that influence how well the firm operates. The **external environment** consists of those elements outside the organization—the organization's opportunities and threats—that may affect its choices and capabilities. Unlike elements of the internal environment that management can control to a large degree, the firm can't directly control these external factors, so management must respond to them through its planning process.

A key aspect of the external environment is the brand's competition. Analyzing competitive social media efforts and how the target market perceives those efforts is a must-do in social media marketing planning. It can be done in much the same way as the social media audit—except the focus is on the competing firms. You can use an internal system or a **cloud service** such as RivalMap ([www.rivalmap.com](http://www.rivalmap.com)) to organize competitive information and to monitor news and social activity. When you use RivalMap, you can maintain a search of competitive activity and news mentions online for a small fee.

A competitive social media analysis should answer the following questions:

- In which social media channels and specific vehicles are competitors active?
- How do they present themselves in those channels and vehicles? Include an analysis of profiles, company information provided, tone, and activity.
- Who are their fans and followers? How do fans and followers respond to the brand's social activity?

Importantly, marketers have many approaches to solving problems and taking advantage of opportunities. Here we are concerned with the organization's use of social media, but still, the planner should ask the question, "Given the situation and the problem identified, is social media marketing the appropriate approach?" Especially for organizations that are still in the trial phase, it's tempting to focus on social media "gimmicks" even if other less trendy tactics might in fact be more effective. So, a word of caution: social media often provide effective solutions to marketing problems, but beware of blindly using these tools.

To see how the early stages of the strategic planning process work in the real world, let's return to our example, Honda. Honda relies upon the positioning of each of its sub-brands but seeks to do so in a way that resonates with specific social media vehicles like Twitter, Vine, and Pinterest. We'll focus on Honda's CR-V and the general brand. This campaign will be in line with Honda's selling points of the CR-V, positioned with the tag line, "Get out and move." Honda is one of the most well-known brands in the world, named 20th on the Forbes most valuable brands list. That's not all; the brand has won awards for most trusted car brand, best value brand, and best overall brand! But, Honda faces stiff competition online and off.

## THE DARK SIDE OF SOCIAL MEDIA

When brands choose to engage in social media, they need to be sure they understand the commitment. This is especially true for brands in the trial stage of social media marketing maturity. HMV, an abbreviation for His Master’s Voice (which makes sense when you see Nipper’s image listening to the gramophone)—a staple in the music industry, found this out. As a brand in the trial stage of social media marketing, HMV allegedly had an unpaid intern set up its Twitter account. When the intern was gone, management lost track. But the account was still live and someone held the keys (ahem, the password!). As HMV called a meeting to lay off staff members, one of them live-tweeted the meeting using the hashtag #hmvXFactorFiring. Among the most amusing (of these truly sad tweets) is one about a HMV exec asking how to shut down Twitter!<sup>8</sup>



Photo 2.2

HMV closing down © iStock.com/dynasoar

Table 2.3 Honda’s Social Media SWOT Analysis

<p>Strengths:</p> <ul style="list-style-type: none"> <li>• Loyal customers</li> <li>• High brand equity</li> <li>• Affordability</li> <li>• Quality products</li> <li>• High levels of coverage across all forms of media</li> </ul>	<p>Weaknesses:</p> <ul style="list-style-type: none"> <li>• Difficulty standing out in a highly competitive marketplace</li> <li>• Reputation issues due to recalls</li> <li>• Reputation issues related to being an old-school brand</li> </ul>
<p>Opportunities:</p> <ul style="list-style-type: none"> <li>• Social media as a cost-efficient channel</li> </ul>	<p>Threats:</p> <ul style="list-style-type: none"> <li>• Disasters affecting ability to meet demand</li> <li>• Strong brand competition from competitors like Toyota</li> </ul>

## Identify Social Media Marketing Objectives and Set Budgets

In this stage of the process, the planner elaborates on what is expected of the social media campaign and what financial and human resources are available to meet those objectives. An **objective** is a specific statement about a planned social media activity in terms of what that activity intends to accomplish. The content of the objective will vary based on the situation and the problem at hand. For instance, the campaign may be designed to amplify other marketing communication efforts the organization uses. Let's say, for example, the brand co-sponsors a concert series. This series is an event marketing strategy built into the overall marketing communications plan. But the organization realizes that promoting the event using social media can build pre- and post-event buzz. In this case, the objective (to create heightened awareness of the event among target customers) relates to other activities in the organization.

The basic assumption is that the campaign can accomplish desired marketing objectives. What are some examples of the basic marketing objectives social media marketers pursue? Here are some important ones:

- Increase brand awareness.
- Improve brand or product reputation.
- Increase website traffic.
- Amplify or augment public relations work.
- Improve search engine rankings.
- Improve perceived customer service quality.
- Generate sales leads.
- Reduce customer acquisition and support costs.
- Increase sales/sales revenue.

In this stage of planning, it's important to state the objectives in a way that will help the planner to make other decisions in the planning process and eventually to measure the extent to which the objective was accomplished at specific points into the campaign. A well-stated, actionable objective should include the following characteristics:

- Be specific (what, who, when, where).
- Be measurable.
- Specify the desired change (from a baseline).
- Include a time line.
- Be consistent and realistic (given other corporate activities and resources).

Here's an example of an actionable objective: *To increase site stickiness in the retail areas of our site by 100% (from 5 minutes browsing to 10 minutes per site visit) with the addition of social commerce sharing applications by the end of the third quarter.* The statement of the objective should include specific elaboration on the individual goals the brand wishes to achieve over the course of the campaign, taking care to state these goals such that they are specific, measurable, realistic,

and time-lined. We don't know Honda's precise objectives but we can gauge that Honda wanted to build a presence on popular social networks, enable its position to resonate in a way that is tailored to those networks, build brand equity, and increase top-of-mind awareness. Particularly for the #Pintermission campaign, Honda clearly sought to drive awareness of the new CR-V launch for users on Pinterest.

There should be a focus on resources. You've probably heard people say that the main benefit of social media marketing is that it's free? When brand managers work with agencies to plan traditional advertising campaigns, the cost of media placement can seem overwhelming. With that as a point of comparison, one can see why many might think of social media marketing as the free alternative to advertising. We will discuss paid media options in social media vehicles, but most of what brands plan is in the earned media realm.

So then, what's the problem? *Social media are not free.* In planning a social media campaign, a budget must be allocated that ensures sufficient resources to accomplish the goals—just like in a traditional ad program. Granted, the media costs are often much lower compared to, say, a national television campaign. But there are other costs associated with social media. Charlene Li, a leading social media strategist, once said, "Social media trades media costs for labor costs."

What does Li's comment mean? To a large extent, the social communities in which brands engage consumers are indeed free to play spaces in terms of *media costs*. But there are other costs we must take into account. Content must be generated, shared, and managed, and the time that that takes requires funding. Strategies in some social media channels of our social media framework require development costs (in-house or with a vendor or agency) such as customizing profiles and developing social games, branded applications and widgets, and microsites. At the end of the day, there's no such thing as a free lunch!

### Benefits of social media marketing

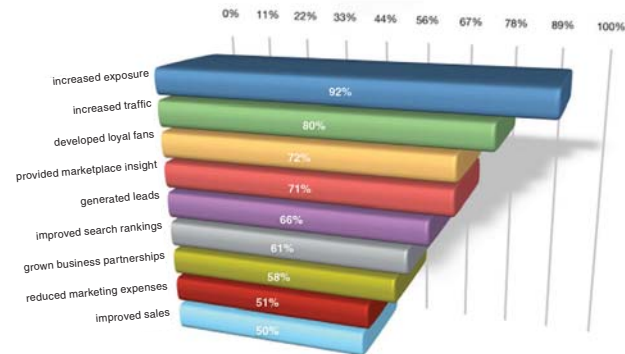


Photo 2.3



Most organizations to date allocate only a small portion of their marketing budgets to social media. Current estimates are under 10%! Though that budget is expected to nearly double in the next 5 years! Where will this money be spent? Primarily organizations are staffing for content management, ensuring that time is available for content development, blogging, and monitoring of social channels. In addition, organizations are not only creating internal positions to manage social media marketing, they are also hiring agencies, consultants, and service providers. As we described in Chapter 1, the job of **social media manager**, akin to that of a brand manager, is becoming more commonplace. This person has the role of overseeing, managing, and championing the social media strategy internally. Agencies and other providers can supplement the work of the social media manager (or team) with ideas, ways to integrate social media marketing with the rest of the brand's marcom plan, technical expertise, and measurement.

As with everything else in business, the budget is critical—without funding, the organization can't initiate or maintain the campaign. How much should it allocate? When it comes to social media campaigns, budgets run the gamut from a few hundred to hundreds of thousands of dollars (particularly for complex campaigns like those associated with global alternate reality games, which we'll look at in Chapter 7).

Many companies approach social media marketing budgets as a percentage of their ad spends, which in turn are assigned by planners within the organization according to one of several formulae. The **percentage of ad spend** method assigns a set portion of the overall advertising budget for the organization to social media activities. Some use a variation, where they allocate a percentage of online marketing funding to social media.

Two other methods are used by companies. The **competitive parity method** uses competitors' spending as a benchmark. Like advertiser share of voice, competitive parity is based on the belief that spending the same or more on social media marketing will result in a comparable change in share of attention for the brand. When it comes to social media, though, share of voice takes on a new dimension; social media include conversations about the brand from other sources. In contrast, with advertising, increasing share of voice is accomplished by simply purchasing more media time for advertisements.

With social media marketing, the costs of different approaches and platforms vary widely, and even a large spend may not result in widespread buzz or content sharing and viral spread. The resulting share of voice depends in part on the extent to which fans and friends share the message with their own networks. Lastly, the **objective-and-task method** considers the objectives set out for the campaign and determines the cost estimates for accomplishing each objective. This method builds the budget from a logical base with what is to be accomplished as the starting point.

## Profile the Target Audience of Social Consumers

Social media marketing plans, like any marketing plan, must target the desired audience in a meaningful and relevant manner. To do this requires the development of a

**social media profile** of the target audience. The target market for the brand will have been defined in the brand's marketing plan in terms of demographic, geodemographic, psychographic, and product-usage characteristics. The target audience's social profile will take this understanding of the market one step farther. It will include the market's social activities and styles, such as their level of social media participation, the channels they utilize and the communities in which they are active, and their behavior in social communities. You'll learn more about the behaviors and attitudes of social consumers in Chapter 3.

The strategic planner must assess what it means to speak to the audience in the social media space. Who is the core target? How can we describe the key segments of that core target? To whom will the conversations in social media be directed? Of which social communities are the consumers a member? How do they use social media? How do they interact with other brands? The insights from the consumer profile that was done for a brand's overall marketing and marcom plans will be useful to understand the overall profile of the target market.

However, the planner also must understand how and when his or her customers interact in online social communities, as well as which devices they use to do so. In developing a consumer profile, the planner may plot out a typical day for the social media user as well as gather information on the Internet activities of the audience.

Let's see how Honda went through this profiling process. Its strategy for the #Pintermission campaign included specifically targeting Pinterest users. The average user of Pinterest is a female in the age range of 18 to 40.

## Select Social Media Channels and Vehicles

Once the organization understands who it wants to reach, it's time to select the best **social media mix** to accomplish this. The zones of social media make up the channel and vehicle choices available for a social media mix. Similar to a more traditional marketing mix, the social media mix describes the combination of vehicles the strategy will include to attain the organization's objectives.

The social media mix options lie among the four zones we've already discussed: relationship development in social communities, social publishing, social entertainment, and social commerce. Within each zone are many specific vehicles that may be best suited to reach a certain audience. For instance, to meet the desired objectives and the social media patterns of a target audience that includes college students, the planner may determine that the campaign should include social networking, social publishing, and social games. The media vehicles might include Facebook, YouTube, and Flickr. Social publishing may utilize a corporate blog and document sharing sites such as Scribd. The brand may choose to utilize an existing social game. You've seen examples of the choices brands made as they developed effective social media campaigns. It's also a good idea at this stage of planning to map out how the campaign will build earned media and utilize paid and owned media synergistically. In the #Pintermission example, Honda chose to utilize social publishing in the social vehicle, Pinterest. But notably, this is not Honda's



only social media approach. It also planned campaigns for Vine and Twitter, as well as maintaining a social media presence on an ongoing basis. See Figure 2.1 for a summary of Honda's zone activity.

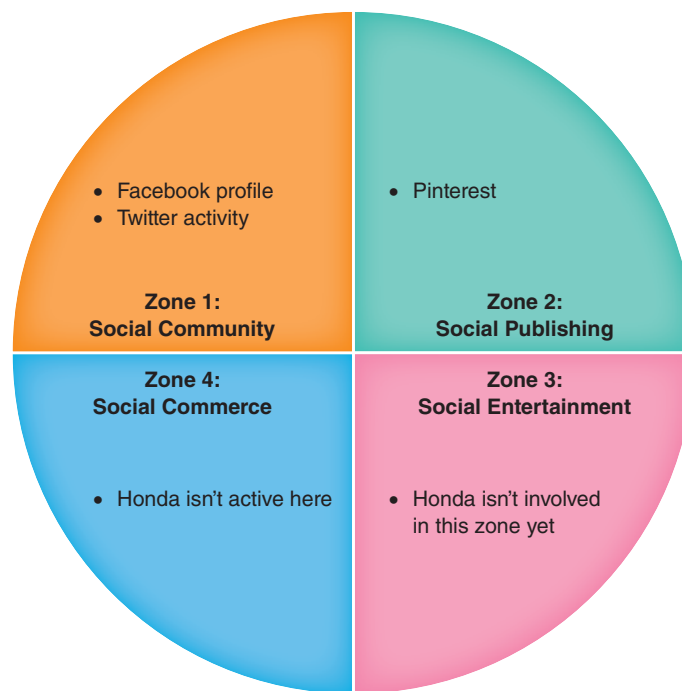


Figure 2.1 Honda's Zones of Social Media Marketing

### Create an Experience Strategy

If we were planning an advertising campaign, the next step would be to identify a [creative message strategy](#). [Message strategy](#) refers to the creative approach we will use throughout the campaign. This should flow from the brand's [positioning statement](#)—a single written statement that encapsulates the position the brand wishes to hold in the minds of its target audience. Positioning statements succinctly capture the heart of what the brand is and what the sponsor wants it to become. Reviewing the position is a necessary step in preparing a social media marketing strategy, because the social media activities the campaign plans and executes need to consistently support the desired message.

Can you identify the brands that go with these positioning statements?<sup>9</sup>

- 1 The computer for the rest of us
- 2 Networking networks
- 3 The world's information in one click
- 4 Personal video broadcasting network

Answers: (1) Apple, (2) Cisco, (3) Google, (4) YouTube

The message strategy should also be appropriate to meet the campaign's objectives. It is developed from a **creative brief**—a document that helps creatives channel their energy toward a sound solution for the brand in question. In planning for social media marketing campaigns the design process works similarly; the planners create a brief to guide the development of the campaign. But—because unlike traditional media, social media focus on interactive experiences, social sharing, and engagement—the brief has a somewhat different structure and goes by a different name. Some planners call this document an **experience brief**.

The concept of an experience brief evolved from the work of website developers who consider the direct impact on users when they design site architecture, imagery, copy, and other site features. Griffin Farley, a strategy planner, uses a different term. He describes the planning document for social media as a **propagation brief**.<sup>10</sup> He explains that propagation planning means to plan not for the people you reach, but for the people that *they* will reach. In other words, traditional advertising promotes a message to a passive audience, and that audience is the target. Social media invite an interactive experience with an audience of influencers who will then share the brand's message and invite others to the experience. To develop a social experience worthy of participation and worthy of sharing, social media planners ask and answer several questions.<sup>11</sup> The answers become the basis for the brief:

- **What are the campaign goals and/or communication tasks?** Objectives have been set for the campaign and the use of social media identified as a possibility. Here the planner reviews these decisions and provides a succinct overview of the goals.
- **How is the brand positioned? What is unique and special about its position in the marketplace?** As in a traditional creative brief, any campaign work should leverage the brand's positioning strategy and build on the brand's strengths.
- **Who is the target audience?** You've profiled the target already. Now consider what you want the audience to do. Do you want them to talk to the brand? Create and share content? Spread the message to their network? On what devices (e.g., iPad, smartphone, desktop) will they interact with your brand? What could you offer of value in exchange for their cooperation?
- **Is there another group of people who can persuade the target audience to follow them?** This group is your *influencers*—the people who will propagate your message. Why would these people want to share your message with others? What's in it for them?

- **What are the existing creative assets? How can the brand's creative foster a social experience?** Most brands already have some **creative assets** that drive their paid and owned media. For example, a well-known and popular brand spokesperson such as the GEICO gecko is a creative asset that the insurance company has developed in its traditional advertising, so he might be employed in a social media campaign to give the company a head start in terms of consumer recognition as it tries to break through the clutter of competing messages. The planner should list the creative assets that already exist and identify the assets he or she still needs to extend the brand's story. How can the creative assets already available be used and/or leveraged in a social media context?
- **How can we integrate with other branded media being used by the organization, and how long do we have to execute?** This is a question that references how the campaign can integrate best with the brand's paid and owned media.
- **What experiences are possible given target market needs and motives, the available channels, and the creative assets? How can we design these experiences to maximize device portability and access?** Creative assets used in social media campaigns should inspire activity and interactivity. These questions ask what types of activities could be engaging for the target audience using multiple devices and worth sharing with their network.
- **What content will be needed?** Social media are content-driven. What content will be relevant to the campaign and what will be the source? Comments? Questions and polls? Video? Images? Stories? Apps?
- **How will experience engagement be extended and shared throughout the social channels?** For instance, will engagement activity auto-post to status updates (e.g., "Tracy likes Cole Haan")?

After the planner goes through the process of **discovery** and **briefing** to provide these "must-knows" to the creative team, the creative team will then enter the stage of **ideation** or **concepting**. *Discovery* is the term used to describe the research stage of the plan. Planners may rely on secondary and primary research as they seek to discover insights that will be useful to the creative team. These insights will be presented to the team during the briefing. The creative team will spend time brainstorming ideas and developing possible concepts for the campaign. Eventually the chosen ideas will be further refined and designed, and **prototypes** or mock-ups will be developed. These preliminary executions can then be used for internal review, usability testing, and other pre-testing.

When a brand begins to interact in social spaces, a key decision is how to represent the brand's **social persona**. This means planners need to define how the brand will behave in the social Web, what voice will be used, and even how deeply the brand will interact in the social space with customers. The decisions made should support the brand's position in the market. To introduce that persona, brands have several creative options. They may involve humanizing the brand (again, think of the GEICO gecko); showing a vulnerability to the customer and working as a steward to customer service (think Dell); or providing a value to the customer whether that value be function, information, or

entertainment (think Nike). In Honda's case, the brand's position is brand as corporate entity.

Additionally, the makeup of the brand's social persona may vary. Other brands, such as Zappos, utilize different employee voices in social communities so the online retailer's persona is the sum of its employees. Still others have represented the brand with a person, but with a single individual charged with the brand's social reputation. The brand's mascot may take the social stage as Travelocity has done with its Roaming Gnome. Some brands present themselves as funny, comedic, thought leaders, and friends. There is no right or wrong social persona—it should ultimately be a social representation of the brand's position and of course be consistent with how the brand presents itself in other contexts.



Photo 2.4

So what did Honda plan? For its #Pintermission campaign, it leveraged relationships with five of the most influential “pinners” on Pinterest. You’ll learn more about the nature of influence in Chapter 4, and the specific approach of leveraging influencers in Chapter 6. These pinners are seemingly always on. They pin a lot of content and their curations are so widely respected that each pinner has nearly a million followers. That’s some serious street cred. The #Pintermission campaign asked these five pinners to take a break—to take an *intermission* from social media. That was the experience. Why would they? Honda paid and offered a prize for the photos originating from the #Pintermission. The photos had to be tagged #Pintermission and they led back to the Honda website, which enabled measurement. That was Honda’s Pinterest campaign, but it also used other social vehicles in its overall plan (as discussed in the Show Me! box on the following page).

### Integrate With Other Promotional Components and Establish Campaign Timeline

Traditional media campaigns typically live a designated lifespan with timing tied to the accomplishment of specific objectives. For social media, though, campaigns are not necessarily events with fixed start and stop dates. Conversations in communities continue over time, and a brand's social media marketing presence should do this as well. This is particularly true for brands that rely on social media for customer service and customer relationship management. Some of the most famous social brands, like Dell and Zappos, are “always on” with their social media campaigns. They aim to project a constant presence

## SHOW ME!



For instance, Honda launched a campaign that further promoted the company's popular Summer Clearance Sales Event. The campaign creatively combined both Twitter and Vine and used them to increase and engage the company's audience. The whole campaign idea is based around Honda responding in near real-time to unhappy car owners on Twitter with a personalized 6-second Vine video reflecting the message of the original Tweet. Participants had to use the #WantNewCar hashtag for Honda to know that it should respond to it. The more original the message, the higher the probability that the team responded. While all social media initiatives lived online, traditional media coverage was also present. That's not all Honda did. It also thoroughly invested in zone 1—social community—by engaging in conversations with other engaged brands on Twitter. Honda sent antagonistic remarks to 15 powerful brands in a humorous way designed to spark engagement and conversation. Take a look at the message Honda tweeted to Oreo.



Dear @Oreo, nothing personal, we just don't like your crumbs on our seats-  
odyssey w available Built-in HondaVAC [pic.twitter.com/fg5vN7sZvK](http://pic.twitter.com/fg5vN7sZvK)

HONDA @HONDA, TUE, OCT 01 2013 14:20:16 REPLY L7 RETWEET FAVORITE

Photo 2.5

in the communities in which they participate. Honda uses a mix of short-term campaigns and ongoing presence. Other organizations have also done this.

### Execute and Measure Outcomes

In the final stage of the strategic planning process, we implement the plan and measure the results. In Chapter 10, we'll go into detail about the *metrics* we can use to assess the effectiveness of social media campaigns. The data gathered on all aspects of the social media plan are used to provide insight for future campaigns.

As we've seen, many organizations are still "social media wannabes." They're at an early stage in the process and feeling their way in a new environment. So perhaps we can forgive them for the common mistakes they tend to make. Here are some of the biggest offenders:

## FROM BYTES TO BUCKS



Ridden on the metro lately? In Melbourne, the Metro is the city's premier rail service. It operates 203 six carriage trains across 803 kilometers of track and transports around 415,000 customers each day. With 15 lines, 218 stations, and services seven days a week, Metro can take you wherever you're headed, whenever you want to go. It is "fully committed to providing a comfortable, safe, and reliable train network as part of an interconnected public transport service, striving to rival the world's best."

What was the background? Metro wanted to reduce train accidents, most of which involved young people. Kids constantly ignore safety messages. To combat their resistance, Metro needed a campaign that catered to this young audience. Something humorous and colorful [with a catchy song] should do the trick! How can teenagers possibly resist dark humor that makes light of a real safety issue? Will it work? Critics said, "Behavior change is a hard thing to market; it's not an easily measurable target—there is no conversion rate, and only time will tell if it's effective. However, in labeling train accidents 'dumb' instead of 'tragic,' this campaign can tap into an important principle for behavior change marketing, and that is that peer pressure and shame can make people change their habits. No one wants to be thought of as dumb."<sup>12</sup>

The campaign pursued three key objectives:

- 1 To promote railway safety among the general public, specifically the teenage/young adult market
- 2 To decrease the number of railway related deaths by [at least] 5% next year
- 3 To connect customers with Metro by showing them that it is a safe and reliable form of transportation

Who was the target audience? All types of individuals use the public transportation system to get around. With that said, it is the younger demographic (e.g., 14 to 20) that is reluctant to pay attention to safety warnings. Maybe it's because they always have their head stuck in a phone, Facebook, Twitter, or some other form of social media. In any event, Metro has to find some way to get through to them.

How could they move forward? The executive creative director for Metro, John Mescall, echoes these sentiments: "Pretty early on, we decided we'd try to create entertainment rather than advertising. For the simple reason that we figured if traditional public service announcements (PSAs) repel people, then we should really try to create one that attracts them."<sup>13</sup>

Metro decided to use three zones—social community (Facebook and G+), social publishing (YouTube video and Tumblr), and social entertainment (branded social game).

The heart of the campaign is in social publishing. Metro developed a video that it released on YouTube, titled *Dumb Ways to Die*. Metro recognized that it would likely attract earned media as marketing

*(Continued)*



*(Continued)*

blogs discussed the campaign (assuming it was worthy of discussion and it was!). In fact, not only was the video shared by news media, it was shared by—well, everyone. It became among the most shared viral videos ever. EVER!

Since the target population is teenagers/young adults, it is only natural that the loveable characters become part of a downloadable app for Android on Google Play incorporating part of the social entertainment zone.

Why was this a good experience strategy?

The goal of this campaign was to bring awareness to Metro and its support for railway safety. By making a mockery of the subject on Facebook, Twitter, Google +, YouTube, will kids retain the ‘important message’ a bit longer? Incorporating cartoon characters, catchy verses, and a “dumb” idea into a 3-minute segment was all part of the strategy. Metro spent around \$300,000 on the campaign.<sup>14</sup> What happened? Within 3 months of the campaign’s release, Melbourne Metro saw “a 21% reduction in railway accidents and death.” In addition, the campaign has generated over 70 million views on YouTube, 12,000 likes on Facebook, 269 followers on Twitter, and 123 members on Google +. It has also won quite a few awards, including seven Webbys, three Sirens, and the Integrated Grand Prix at the Cannes International Film Festival.<sup>15</sup> Let’s call that a win.

- **Staffing:** The initial imperative when it comes to social media marketing is to simply get there—to have a presence in the community of interest. But focusing on presence can result in brand assets that are underutilized and underperforming in terms of the objectives set for the campaign. Organizations in the trial and transition phases tend to focus on establishing Facebook profiles and Twitter accounts, or perhaps on planning a UGC (user-generated content) contest. These companies take an “if you build it, they will come” *Field of Dreams* approach, without addressing ways to build and maintain **traffic** and interest. Ultimately though, social media marketing is built on the community, content, and technology inherent to social media. To make it successful, the brand must be active in the space—and that means committing staff time to posting, responding, and developing content.
- **Content:** A related issue is the failure to introduce new, fresh, and relevant content. Developing interactivity, emphasizing relevance, monitoring the asset for needed maintenance, responding to visitor feedback, and providing new content will keep the asset fresh and inspire a curiosity to return among the core audience. Importantly, these components of successful social media marketing require an ongoing commitment of human resources.
- **Time Horizon:** Social media work differently than do traditional advertising, and may require patience before results are delivered. Although a television campaign can utilize a heavy buy early in its media plan to incite near immediate awareness

and build momentum, social media are just the opposite. It can take months for a social media campaign to build awareness (and there are plenty of social media failures that never gained traction). Assuming the plan itself is sound, organizations must be patient while the community embraces the content and the relationship. Although the results may take longer to see, the overall effectiveness and efficiency of the social media model can be well worth the patience and resources required.

- **Focus of Objectives:** It's not uncommon for organizations to focus on action steps rather than desired outcomes from social media. In other words, they take a short-term tactical approach rather than a long-term strategic approach. An inappropriate objective might read: "Increase engagement by responding to comments on Twitter and Facebook within 24 hours of posting, posting three status updates per business day, and adding links to social media accounts on the corporate blog." Do you see the error? The emphasis is on the action steps the social media manager will complete (tactical) but there's no focus on what the social media activities should *do* for the brand. There is no value in doing social media marketing for the sake of social media—the value lies in accomplishing marketing objectives. Social media are more than the "flavor of the month"—they have the potential to provide lasting and measurable benefits when campaigns are done right.
- **Benefits to Users:** Social media live or die on the quality of the content a platform offers to users. That content must add value to the social community. A social media marketing plan answers the question: How will we distribute our content using social media channels? But it also must answer other questions: How can we engage our target audiences in social media communities? What content is valued by our audiences? Do they want content that informs? Entertains? How can we develop an ongoing stream of relevant, fresh content?
- **Measurement:** Organizations fail to properly measure results. Marketing consultant Tom Peters famously observed, "What gets measured gets done." As social media marketing has developed, some evangelists have encouraged new disciples to keep the faith, emphasizing the growth and popularity of the media as reason enough to develop a presence in the space. In the long term, that's just not good enough. For organizations to succeed in social media marketing, measurement is critical. Measuring outcomes ensures that the organization is learning from what worked and what didn't. Importantly, as organizations begin to shift more marketing dollars from traditional advertising to social media marketing, managers will seek out comparisons on metrics such as ROI (Return On Investment) between social media and other media options.

## Develop a Planning Structure in the Organization

So there we have it—a framework to plan a social media marketing campaign. But just how does the planning and execution of a campaign get done—and who does it? These jobs didn't even exist a few years ago; many organizations are scrambling to create a structure that will enable their people to take advantage of these new methods.



Social media personnel can cross several areas of a company's organizational chart. Who has responsibility for the planning, execution, and evaluation of social media marketing strategies? Who should be involved in social media marketing activities? Should there be limitations to social media use within the company? Especially for large companies, different divisions and units may pursue a variety of tactics, ultimately resulting in a disparate collection of pages across social media sites—many ultimately abandoned. Some accounts are abandoned as the campaign component comes to a close. Others quit perhaps due to lack of time, staff, or funding—or simply because their desire to explore the space waned over time.

### The Social Media Policy

Companies need to develop, adopt, and publicize a [social media policy](#) among employees. A social media policy is an organizational document that explains the rules and procedures for social media activity for the organization and its employees. Just like you, many employees are already engaged in social media. They may be active on social networking sites and microsharing tools like Facebook and Twitter. While employees may use social media to communicate with friends and access entertainment opportunities (maybe even when they're supposed to be working!), there's a good chance they will mention their employers and maybe even vent about office politics or shoddy products. Managing that risk is a must for companies. And many companies will recognize that these employees can act as powerful brand ambassadors when they participate in social media. As we mentioned, Zappos takes advantage of the fact that many of its employees participate in social media vehicles—and these enthusiastic team members promote the company in the process.

Of course, there's no guarantee that an employee (at least on his or her own time) will necessarily say only glowing things about the company. Brands use formal documents to ensure that the company is protected in a legal sense and also to encourage employees to participate in ways that are consistent with the brand's overall strategy. Here are excerpts from three companies' policies:<sup>16</sup>

- *Microsoft*: If you plan to tweet about any professional matters (such as about the business of Microsoft or other companies, products, or services in the same business space as Microsoft), in addition to referencing your [alias@microsoft.com](mailto:alias@microsoft.com) email address, whenever possible use the service's profile or contact information to assert that you are a Microsoft employee and/or affiliated with a specific group/team at Microsoft.
- *Sun Microsystems*: Whether in the actual or virtual world, your interactions and discourse should be respectful. For example, when you are in a virtual world as a Sun representative, your avatar should dress and speak professionally. We all appreciate actual respect.
- *Intel*: Consider content that's open-ended and invites response. Encourage comments. You can broaden the conversation by citing others who are blogging

about the same topic and allowing your content to be shared or syndicated ... If you make a mistake, admit it. Be upfront, and be quick with your correction. If you're posting a blog, you may choose to modify an earlier post—just make it clear that you have done so.

The Word of Mouth Marketing Association (WOMMA) developed a quick guide to designing a digital social media policy, shown in Table 2.4. Its purpose is to guide how the organization, its employees, and agents should share opinions, beliefs, and information with social communities.<sup>17</sup> Not only is it good business, it can also help prevent legal problems. The WOMMA guide encourages organizations to make several decisions and include those in an organization-wide social media policy. Organizations must decide upon:

- *Standards of conduct:* Standards of conduct in a social media policy refer to the basic expectations for employee behavior in social communities. At a minimum, WOMMA recommends that the standards require that all online statements about the business be honest and transparent. Deceptive, misleading, or unsubstantiated claims about the organization or its competitors must not be issued. Further, good manners must be used in social communities (no ethnic slurs, personal insults, rumors, lies, or other offensive statements).
- *Disclosure requirements:* Transparency is key in online communities. Employees must disclose that they are affiliated with the organization. If they are receiving material compensation or gifts in exchange for posting, this must be disclosed. Disclosing affiliations ensures that readers can still find the posts credible and trustworthy. WOMMA recommends that bloggers include a simple statement: “I received [insert product name] from [insert company name] and here is my opinion ...” In addition, when using posts on social networks, WOMMA recommends that the poster use **hashtags** to disclose the nature of relationships reflected in the posts: #emp (employee/employer), #samp (free sample received), #paid (paid endorsement).
- *Standards for posting intellectual property, financial information, and copyrighted information:* Many of the potential legal problems within social media relate to the inappropriate sharing of information. WOMMA recommends that organizations keep all intellectual property and private financial information confidential. Prior to posting copyrighted information, appropriate permissions should be collected.

## An Organizational Structure to Support Social Media

Who “owns” social media within an organization? Some brands assign the responsibility to a discipline “silo” such as the marketing department, whereas others rely upon a [center of excellence model](#) that pulls people with different kinds of expertise from across the organization to participate. This eliminates the internal political issues relating to who in the company has primary responsibility for social media so it's easier to integrate social media applications with other marketing initiatives.

Table 2.4 WOMMA guidelines

KEY ASPECTS OF THE WOMMA DISCLOSURE FORM
<p>Personal and Editorial Blogs</p> <ul style="list-style-type: none"> <li>• I received _____ from _____ sent me _____</li> <li>• Product Review Blogs</li> <li>• I received _____ from _____ to review</li> <li>• I was paid by _____ to review</li> </ul> <p>Additionally for product review blogs, WOMMA strongly recommends creating and prominently posting a "Disclosure and Relationships Statement" section on the blog fully disclosing how a review blogger works with companies in accepting and reviewing products, and listing any conflicts of interest that may affect the credibility of his or her reviews.</p>
<p>Providing Comments in Online Discussions</p> <ul style="list-style-type: none"> <li>• I received _____ from _____</li> <li>• I was paid by _____</li> <li>• I am an employee [or representative] of _____</li> </ul>
<p>Microblogs</p> <p>Include a hash tag notation, either:</p> <ul style="list-style-type: none"> <li>• #spon (sponsored)</li> <li>• #paid (paid)</li> <li>• #samp (sample)</li> </ul> <p>Additionally, WOMMA strongly recommends posting a link on your profile page directing people to a full "Disclosure and Relationships Statement." This statement, much like the one WOMMA recommends for review blogs, should state how you work with companies in accepting and reviewing products, and list any conflicts of interest that may affect the credibility of your sponsored or paid reviews.</p>
<p>Status Updates on Social Networks</p> <ul style="list-style-type: none"> <li>• I received _____ from _____</li> <li>• I was paid by _____</li> </ul> <p>If status updates are limited by character restrictions, the best practice disclosure requirement is to include a hash tag notation of either #spon, #paid or #samp. Additionally, WOMMA strongly recommends posting a full description or a link on your social network profile page directing people to a "Disclosure and Relationships Statement." Note that if an employee blogs about his or her company's products, citing the identity of the employer in the profile may not be a sufficient disclosure. Bloggers' disclosures should appear close to the endorsement or testimonial statement they are posting.</p>
<p>Video and Photo Sharing Websites</p> <p>Include as part of the video/photo content and part of the written description:</p>

**KEY ASPECTS OF THE WOMMA DISCLOSURE FORM**

- I received \_\_\_\_\_ from \_\_\_\_\_
- I was paid by \_\_\_\_\_

Additionally, WOMMA strongly recommends posting a full description or a link on your video and/or photo sharing profile page directing people to a "Disclosure and Relationships Statement."

**Podcasts**

Include, as part of the audio content and part of the written description:

- I received \_\_\_\_\_ from \_\_\_\_\_
- I was paid by \_\_\_\_\_

Additionally, WOMMA strongly recommends posting a full description or a link directing people to a "Disclosure and Relationships Statement."

Source: <http://womma.org/main/Quick-Guide-to-Designing-a-Social-Media-Policy.pdf>, accessed September 2011.

Aside from the organizational structure to support social media marketing efforts, businesses must make decisions on the level of resources to dedicate. Social media are ongoing conversations across potentially several communication vehicles. Some businesses dedicate multiple employees to manage the conversation calendar whereas others assign a single person. The organizational task is to assign the least number of resources needed internally and then supplement those resources with help from the organization's social media agency resources.

There are five basic models for social media structure:<sup>18</sup>

- Centralized
- Organic
- Hub and Spoke
- Dandelion
- Holistic

- 1 In the **centralized structure** the social media department functions at a senior level that reports to the CMO (Chief Marketing Officer) or CEO and is responsible for all the social media activations. The potential problem here is that all social media activity may not be adequately represented. Is customer care going to be good if social media marketing is housed under marketing rather than customer service?
- 2 In the **organic structure** no one person owns social media. Instead, all employees represent the brand and work social media into their roles. This is implemented through training and used across the organization. The danger here is that the content can end up off message. Any employee can sign up to respond to customer queries on Twitter. That means the company cannot control what employees say. Therefore, the company must have a well-developed social media policy in place to guide employee behavior in social communities.

- 3 In the **hub and spoke** (also called the coordinated) **model**, a team of people who are cross-functionally trained are ready to address various social media needs. This is currently the most popular structure for social media management.
- 4 The **dandelion model** is essentially a multi-layered hub and spoke model. It is appropriate for companies with strategic business units (SBUs) that still represent a core brand.
- 5 The **holistic model** is currently the least used. It truly refers to a structure within which all employees are empowered to use social media, use social media, and do so according to the company's strategy.

Visit: <http://www.web-strategist.com/blog/2010/04/15/framework-and-matrix-the-five-ways-companies-organize-for-social-business/>.

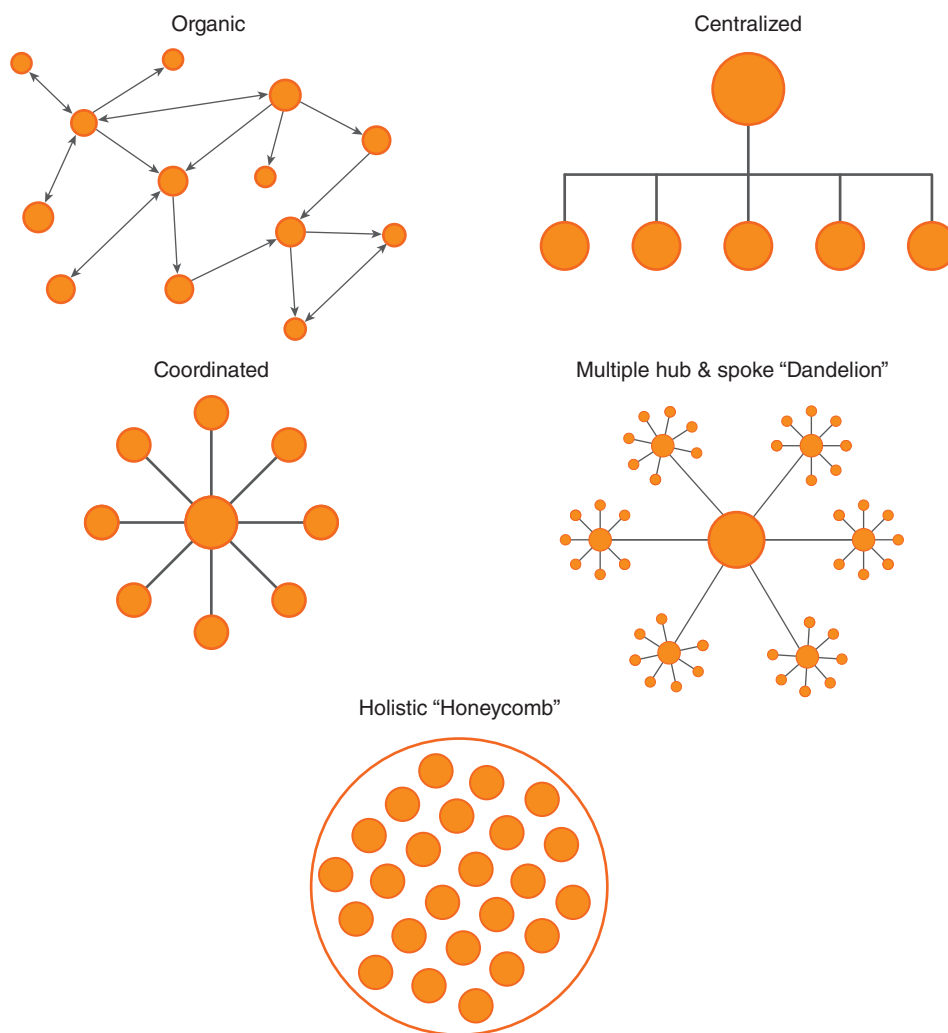


Figure 2.2 A series of images on Organization Structures for Social Media Marketing Management. Images courtesy of the Altimeter Group

## Social Media Management Systems

Regardless of the structure a company uses or the policy it develops, it must also devise a day-to-day system for managing the content, content delivery, and response to user-generated content that are all a part of a social media marketing campaign. Companies may utilize in-house systems or may partner with a company like Salesforce for enterprise-level management.

Whether on a small or large scale, one of the most used systems is Hootsuite. Notably, Hootsuite offers a special program for university users that includes an option to become Hootsuite Certified.



Photo 2.6 Hootsuite University, Social Media Management Certification

Visit: <https://learn.hootsuite.com>

## CHAPTER SUMMARY



### Where does social media marketing planning fit into an organization's overall planning framework?

Social media marketing should be a part of an organization's marketing plan. Like integrated marketing communications plans, organizations may also develop stand-alone plans offering greater social media marketing.

### What are the phases of social media marketing maturity? How does social media marketing change for companies as they shift from the trial phase to the transition phase and eventually move into the strategic phase?

The phases of social media marketing maturity are trial, transition, and strategic. In the trial phase, organizations are pursuing social media tactics in an ad hoc manner, with a focus on gaining experience in social media. The tactics are not well linked to the organization's overall marketing plan and may be haphazardly executed. Organizations in the transition phase think more systematically about how to plan social media activities that support marketing objectives. When an organization enters the final, strategic phase, it utilizes a formal process to plan social media marketing activities with clear objectives and metrics.

*(Continued)*

*(Continued)*

Social media are now integrated as a key component of the organization's overall marketing plan.

### **What are the steps in social media marketing strategic planning?**

The social media marketing strategic planning process consists of the following steps:

- Conduct a situation analysis and identify key opportunities.
- State objectives.
- Gather insight into and target one or more segments of social consumers.
- Select the social media channels and vehicles.
- Create an experience strategy.
- Establish an activation plan using other promotional tools (if needed).
- Manage and measure the campaign.

### **How can organizations structure themselves to support social media marketing?**

Companies can structure themselves as centralized, decentralized, hub and spoke, dandelion, or holistic. Each option represents a trade-off of control and responsiveness.

### **What are the key components of an organizational social media policy, and why is it important to have such a policy in place?**

Policies may include several guidelines such as standards of conduct, disclosure requirements, and standards for posting intellectual property, financial information, and copyrighted information. Companies need policies to ensure that social media activity is consistent with the overall brand.

## KEY TERMS

activation tools  
briefing  
center of excellence model  
centralized structure  
competitive parity method  
concepting  
creative brief  
creative message strategy  
discovery  
experience brief  
external environment  
hashtags

ideation  
internal environment  
marketing plan  
message strategy  
objective  
objective-and-task method  
percentage of ad spend  
positioning statement  
propagation brief  
share of voice  
situation analysis  
social media audit

social media marketing  
maturity  
social media policy  
social media zombie  
social persona  
strategic phase  
strategic planning  
stunts  
SWOT analysis  
traffic  
transition phase  
trial phase

## REVIEW QUESTIONS



- 1 Why do some organizations enter the trial phase without planning and research? Is there value in getting social media experience before social media marketing becomes part of the marcom plan?
- 2 Explain the phases in the social media marketing maturity life cycle.
- 3 What are the forms of organizational structure used by companies embracing social media marketing? What are the pros and cons of each?
- 4 Explain the steps in the social media marketing strategic planning process.
- 5 What approaches to budgeting can be used by organizations planning for social media marketing?

## EXERCISES



- 1 Visit [www.thecoca-colacompany.com/socialmedia/](http://www.thecoca-colacompany.com/socialmedia/) where you'll find Coca-Cola's social media policy, or find the policy for another company. Identify the key components WOMMA recommends be included in a corporate social media policy. How could the policy be improved?
- 2 Identify a social media campaign for a favorite brand. In what experiences does the campaign invite you to take part? In what zones does the strategy lie? Does the campaign include share technologies to ensure your activities are shared with your network?

## CHAPTER NOTES



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*(Continued)*



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