

Social Marketing ROAD Map Handbook

A method for mapping an effective
social strategy

Note: This is an authorized excerpt from the full MarketingSherpa Social Marketing ROAD Map Handbook. To download the entire Report, go to: <http://www.sherpastore.com/SocialROADmapHandbook.html> or call 877-895-1717

Social Marketing

ROAD Map Handbook

A method for mapping an effective social media strategy

Lead Author

Sergio Balegno, Research Director

Contributors

Sean Donahue, Editor

Jen Doyle, Research Analyst

Adam Sutton, Reporter

Production Editor

Brad Bortone, Editorial Production Manager



Social Marketing ROAD Map Handbook

US \$397 / ISBN: 978-1-936390-00-7

Copyright © 2010 by MarketingSherpa LLC

All rights reserved. No part of this report may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, faxing, emailing, posting online or by any information storage and retrieval system, without written permission from the Publisher.

To purchase additional copies of this report, please visit
<http://www.SherpaStore.com>

Yes, bulk discounts are available for multiple copies. Contact:
Customer Service
MarketingSherpa LLC
+1 (877) 895-1717 (outside US, call +401-247-7655)
Service@SherpaStore.com
499 Main Street
Warren, RI 02885 USA

TABLE OF CONTENTS

Table of Contents	ii
Director's Note	2
<i>On the ROAD to social marketing maturity</i>	2
Setting the Stage for Social Marketing	3
Three Questions to ask yourself before getting started	3
1. <i>Where are you now?</i>	3
Worksheet: Determining your organization's phase of social marketing maturity	3
How your organization stacks up against others	4
Chart: Organizations by phase of social marketing maturity.....	4
2. <i>Where do you want to be?</i>	4
Articulating a vision for social marketing success.....	4
3. <i>How will you get there from here?</i>	5
Understanding the challenges	5
Chart: "Very important" challenges to social marketing effectiveness, by primary market.....	5
A financial commitment to overcome challenges and achieve social marketing success.....	6
Chart: How organizations perceive social media marketing at budget time.....	6
The Social Marketing ROAD Map Defined	7
A method for mapping an effective social media strategy	7
<i>The Social Marketing ROAD Map is a continuous improvement process</i>	8
The Social Marketing ROAD Map Cycle.....	8
<i>As social marketers mature, their priorities change dramatically</i>	9
Chart: ROAD Map elements prioritized by phase of social marketing maturity.....	9
<i>Let's get started!</i>	9
Chapter 1: ROAD Map – Research	10
Gathering intelligence on target audiences and their social use	10
<i>Stop, look and listen – social media monitoring</i>	10
<i>What to monitor</i>	10
Checklist: Monitoring search phrases	10
Checklist: Monitoring social media factors.....	10
Chart: Types of social media monitoring tools and solutions used for marketing purposes.....	11
<i>Directory: Social media monitoring tools and solutions</i>	13
Example: Monitoring mentions – analyzing selected MLB brands on all social media.....	16
Segmenting and profiling target audiences	17
Simple segmentation of target audiences by social media behavior and influence	17
Worksheet: Profiling target audiences by social influence, platform preferences and use.....	18
The human factor – resources for a social marketing team	19

Chart: Few organizations are outsourcing social marketing responsibilities 19

Worksheet: Finding candidates, defining roles and recruiting the social marketing team 20

Auditing existing content to identify digital assets 21

Worksheet: repurposing existing content for social marketing use 21

Case study: Target audience survey “enables” Microsoft campaign..... 22

Example: Microsoft’s I Am Enabled Microsite Homepage 22

Case study: Researching target audience behavior while they research you 24

Example: Caturano’s Rapid Assessment Offer..... 25

Example: Caturano’s Link Page 26

Example: Caturano’s Thought Leadership Post 27

Chapter 1 notes 30

Chapter 2: ROAD Map – Objectives 32

Aligning objectives with target audiences and metrics 32

Chart: Organizations targeting and measuring objectives, by social marketing maturity 32

Defining targeted and measureable objectives for social marketing Purposes 33

The difference between marketing communications goals and social marketing objectives..... 33

Example of social marketing objectives hierarchy by marketing communications goals..... 33

Prioritize objectives by effectiveness or impact?..... 34

Chart: Objectives that social marketing programs achieve effectively 34

How to align objectives with target audiences and metrics 35

Aligning objectives with target audiences 35

Aligning objectives with success metrics 35

Metrics that matter in social media 35

Worksheet: Aligning social marketing objectives with target audiences and metrics 36

Case study: The objectives of social marketing in a real estate recession 37

Example: Creative Sample from Ines Hegedus-Garcia: 39

Case study: When the objective of social marketing is a social cause..... 45

Example: California State Parks Foundation Facebook Page 45

Chapter 2 notes 47

Chapter 3: ROAD Map – Actions 49

Creating a social marketing strategy with a tactical plan of action 49

Tactical effectiveness versus “fast and easy” implementation 49

Chart: Comparing the effectiveness, effort required and usage of social marketing tactics..... 49

Tactics for the effective use of social media platforms 50

Guiding principles 50

Blogging..... 51

Micro-blogging 52

Social networking..... 53

Multimedia content sharing 54

Video 54

Images.....	54
Audio	54
Slides.....	54
<i>Other platforms</i>	<i>55</i>
Bookmarking.....	55
Social news sites	55
Forums	55
Wikis.....	55
<i>Engaging the social minority and pitching the social authority</i>	<i>56</i>
<i>The importance of a social media policy and how to draft one.....</i>	<i>57</i>
<i>Budgets and timetables</i>	<i>58</i>
<i>Special Report: Six lessons on developing your social marketing tactical plan.....</i>	<i>59</i>
<i>Case study: How to use Twitter to push your products</i>	<i>63</i>
Example: Woot's Twitter Feed.....	64
<i>Case study: Economic stimulus package lands 7,000 new customers</i>	<i>67</i>
Example: Atlassian Promotion Sign-Up Page.....	67
Integrating social media with other tactics in the marketing mix	70
<i>The ease and importance of social integration.....</i>	<i>70</i>
Chart: Organizations that are integrating social media with other marketing tactics.....	70
Inbound marketing's powerful pair – search and social.....	71
<i>Who is using social media with SEO?.....</i>	<i>71</i>
Chart: Organizations Integrating Social Media into Search Engine Marketing Campaigns.....	71
<i>Why are they doing it? Perceptions of search and social media's objectives</i>	<i>72</i>
Chart: The Effectiveness of SEO Objectives and Social Media Objectives	72
<i>The hidden benefits of integrating social media with search practices.....</i>	<i>73</i>
Chart: Average Target Keyword Rankings by Social Media Use.....	73
Chart: Organic Conversion Rates by Social Media Use	74
Chart: PPC Conversion Rates by Social Media Use.....	75
<i>Perception is not always reality. Social media's truly effective objectives.....</i>	<i>76</i>
<i>Special report: Part 1 – Five key trends in search and social integration.....</i>	<i>77</i>
<i>Special report: Part 2 – Seven tactics to build rankings using search and social.....</i>	<i>81</i>
<i>Case study: Eight steps to create a team-authored blog and reap SEO gains</i>	<i>85</i>
Example: Acoustics By Design Blog.....	89
Social sharing extends the reach of email campaigns and more	90
<i>Formulating a strategy for social sharing</i>	<i>90</i>
Chart: Plans to integrate social media with email campaigns this year.....	90
<i>Social sharing effectiveness.....</i>	<i>91</i>
Chart: The effectiveness of social sharing at achieving email marketing objectives.....	91
<i>Why email needs social media.....</i>	<i>92</i>
Chart: Social sharing leads year-over-year change in email list growth tactics	92
<i>...and why social media needs email.....</i>	<i>92</i>

Chart: Email is the most acceptable channel for permission-based messaging	92
<i>Best practices for designing and optimizing email campaigns for social sharing</i>	93
<i>Case study: How social sharing buttons increased email interaction by 25%</i>	94
Example: SmartBrief Newsletter	97
<i>Case study: Eight essentials for using social media and email to prospect</i>	99
Example: BreakingPoint Employee LinkedIn Template	103
<i>Case study: Five email and social integration strategies to grow audiences</i>	105
Example: Wilton's Newsletter with Social Media Promotion	107
Example: Sample Wilton Tweets Pre-Launch.....	108
Example: Wilton's Yearbook Email Blast	109
Example: Wilton's Halloween Tweets	110
Example: Wilton's Halloween Newsletter.....	111
Summarizing the tactical plan of action	113
Worksheet: Putting the pieces of an action plan together.....	113
<i>Chapter 3 notes</i>	114
Chapter 4: ROAD Map – Devices	116
Selecting platforms by tactical effectiveness and architectural fit	116
Chart: Social Media Technology Platforms Used for Marketing Purposes.....	116
<i>Analyzing the strengths and weakness of social media brands</i>	117
Constructing a social marketing architecture	118
<i>Avoiding random acts of social marketing</i>	118
<i>Constructing a social marketing architecture with a plan and a purpose</i>	119
Example: The hub and spoke architecture for Cisco's Collaboration solutions.....	119
<i>The social marketing architecture hubs</i>	120
<i>Website: The hub of the marketing strategy</i>	120
Example: Cisco Collaboration website for content and conversion	120
<i>Blog: The hub of the social marketing strategy</i>	121
Example: Cisco Collaboration blog for SEO friendly content	121
<i>The social marketing architecture spokes</i>	122
<i>Social network: Building a community of fans on Facebook</i>	122
Example: Facebook fan page for Cisco Collaboration	122
<i>Microblog: Engaging followers in 140 characters or less on Twitter</i>	123
Example: Twitter microblog for Cisco Collaboration	123
<i>Discussion forum: Building a community of technology-oriented members</i>	124
Example: Branded technology community for Cisco Collaboration	124
<i>Multi-media sharing: Driving traffic to platforms from YouTube and Flickr</i>	125
Example: YouTube video sharing for Cisco Collaboration.....	125
Example: Flickr photo stream for Cisco Collaboration	125
<i>Other platforms: RSS feeds, bookmarking and news sites</i>	126
Example: RSS feed from Cisco Collaboration blog.....	126
<i>Content sourcing: Repurposing content from third party sources</i>	127

MarketingSherpa's Social Marketing ROAD Map Handbook

Example: Sourcing content from Cisco Collaboration blog 127

Worksheet: Constructing your social marketing architecture 128

Case study: Exploring alternatives to Facebook with a branded social network 129

Chapter 4 notes 132

The Final Chapter **134**

DIRECTOR'S NOTE

ON THE ROAD TO SOCIAL MARKETING MATURITY

Social media has created an exciting and challenging world of new possibilities for marketers. Until recently, a vast majority of marketers were exploring this unfamiliar terrain without a compass – or strategy – to guide them. Captivated by the hype and the ease of implementing social sites, many ignored proven marketing principles. They launched their social initiatives by creating blogs, Twitter and Facebook accounts without a plan or a purpose.

But a momentous change in the use of social media for marketing purposes is taking place. Social marketing is maturing to the point where the mainstream is now in transition from the trial-and-error phase of the learning curve to the strategic phase. Marketers are learning to begin their social initiatives by researching the medium and monitoring target audiences to determine realistic objectives. Then and only then do they formulate tactical plans and roll-out the social platforms required by the plan. To help marketers ascend this steep learning curve, they need a practical method for mapping their social media strategy. They need to develop a coherent process for achieving objectives that can be easily and routinely performed. MarketingSherpa's Social Marketing ROAD Map was created to fulfill this need.

Based on the ROAD Map methodology, this handbook is a step-by-step guide to mapping your social marketing strategy. It is loaded with research-based insights on proven practices, hands-on worksheets and checklists, and social marketing case studies featuring the real life successes of marketers like you. It is intentionally "social media brand agnostic", meaning that familiar technology brands like Twitter, Facebook, LinkedIn, etc. are used only when necessary as tactical examples. The purpose of this approach is to help you develop a strategy that will outlive technology brands that are often here today and gone tomorrow.

This ***Social Marketing ROAD Map Handbook*** is designed as a teaching tool – not only for advancing the careers of the self-taught but also for those attending MarketingSherpa's Social Marketing Workshops. These workshops are conducted in small classroom settings by social marketing experts using this handbook as a curriculum guide.

Whether you obtain this handbook separately, packaged with the *2010 Social Media Marketing Benchmark Report* or included with a Social Marketing Workshop, it will help accelerate your progress through the phases of social marketing maturity to achieve social marketing success.

As always, we welcome your comments and look forward to hearing from you.

Regards,



Sergio Balegno, Research Director, MarketingSherpa
@SergioBalegno

SETTING THE STAGE FOR SOCIAL MARKETING

THREE QUESTIONS TO ASK YOURSELF BEFORE GETTING STARTED

1. WHERE ARE YOU NOW?

You are about to begin a journey that requires navigating through uncharted territory. To find the fastest and safest route, you need to know two things: where you are now and where you want to be. The same is true for mapping an effective social marketing strategy. Before getting started, you need to know where you are now in terms of the social marketing maturity lifecycle. The following worksheet will help you determine this by analyzing your progress in four process-related factors critical to social marketing success.

To complete the worksheet, circle one number in each row that corresponds with the column heading that *best describes* the process you use for each tactic. For example, if your organization has a formal, documented process that it routinely performs for gathering intelligence on target audiences, their use of social media and your competition in the space, circle 5 in the first row. If your organization has not begun to formulate a process for this tactic, circle 1. After circling one number in each row, sub-total each column and combine columns for your total score. Matching this score to the phase shown in the bottom row will determine where your organization is now in the social marketing maturity lifecycle.

WORKSHEET: DETERMINING YOUR ORGANIZATION'S PHASE OF SOCIAL MARKETING MATURITY

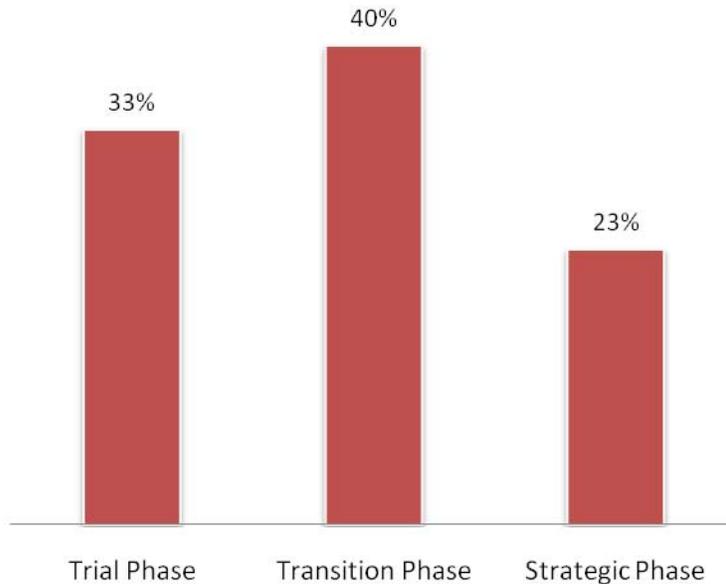
Social Marketing Maturity Process Benchmark	No Process	Informal Process, Randomly Performed	Formal Process, Routinely Performed
Gather intelligence on target audiences, social media use and competition	1	3	5
Define objectives aligned with target audiences and social metrics	1	3	5
Create a social marketing strategy with a tactical plan of action	1	3	5
Select platforms that fit social marketing architecture and tactics.	1	3	5
Sub-Totals			
Total			
Social Marketing Maturity	Trial Phase: 4-6	Transition Phase: 8-16	Strategic Phase: 18-20

Note: If necessary, skip ahead to "The Social Marketing ROAD Map Defined" for a more detailed description of the four factors critical to social marketing success.

HOW YOUR ORGANIZATION STACKS UP AGAINST OTHERS

Once you have completed the worksheet, you will know where you are in the social marketing maturity lifecycle. But it is also important to understand how your organization stacks up against others. Are you lagging behind or taking the lead? The following chart shows the average percentage of organizations in each phase of social marketing maturity based on a survey of more than 2300 marketers.

Chart: Organizations by phase of social marketing maturity



Source / Methodology: MarketingSherpa Social Media Marketing Benchmark Survey /
Fielded Nov 2009, N=2,317

2. WHERE DO YOU WANT TO BE?

ARTICULATING A VISION FOR SOCIAL MARKETING SUCCESS

Leading a successful initiative starts with a vision – in this case, a vision for social media marketing success.

A vision for an initiative is an inspirational description of what a leader would like his team to accomplish, not in terms of specific objectives but a mental image that summarizes what success could or should look like. It's the end game. It can give a team direction and insight – steering current and future objectives, strategies and courses of action.

The challenge is to articulate a clear and concise vision the team will understand and buy into. Clarity will allow a team to make decisions based on your vision. And a ring of drama will inspire the team to give the initiative a higher priority.

Sometimes a vision for an initiative is difficult to articulate but you intuitively know that there is one and, with a little brainstorming, it can be described.

For example, the vision for an online publisher's social marketing initiative might look something like this:

Example: A Vision for Social Marketing Success

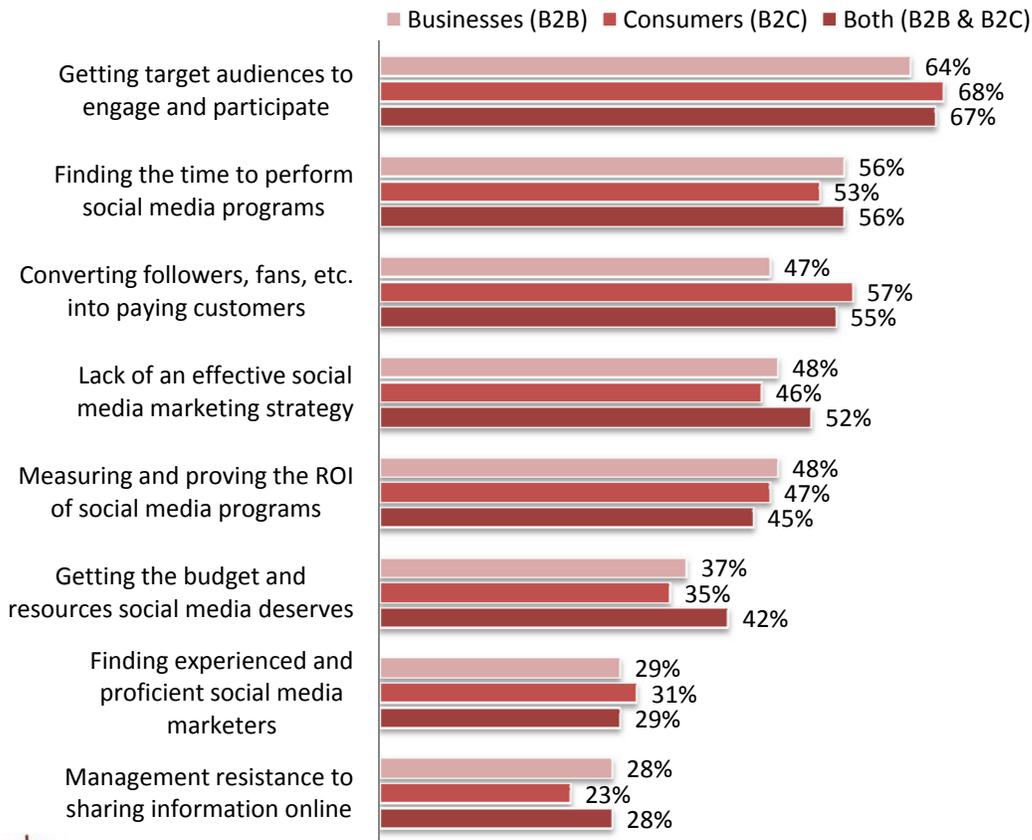
Social media enables us to form and engage communities with common professional interests and challenges. We will develop a compelling social marketing strategy for delivering the insights and know-how members of these communities need. And we will create a compelling persona for interacting with members of these communities in a single, trustworthy voice. As a result, we will be recognized not only as thought-leaders but as innovators in our segment of the online publishing space.

3. HOW WILL YOU GET THERE FROM HERE?

UNDERSTANDING THE CHALLENGES

Fore-warned is fore-armed so be prepared to address these challenges as you proceed through the social marketing planning process. As this chart shows, the challenges to social marketing effectiveness are ranked similarly by marketers in every channel.

Chart: “Very important” challenges to social marketing effectiveness, by primary market

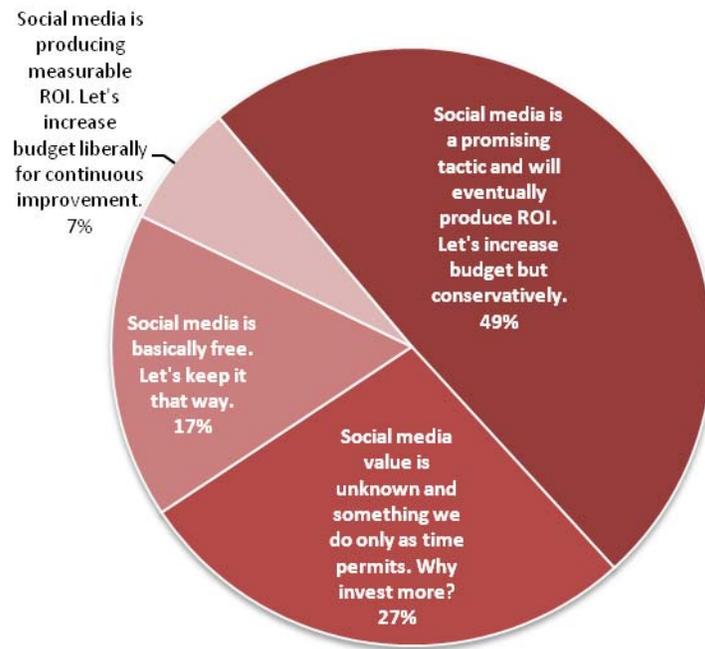


Source / Methodology: MarketingSherpa Social Media Marketing Benchmark Survey / Fielded Nov 2009, N=2,317

A FINANCIAL COMMITMENT TO OVERCOME CHALLENGES AND ACHIEVE SOCIAL MARKETING SUCCESS

Depending on the size and type of your organization, this may simply require a thumbs-up from your boss or demand a full scale lobbying campaign to win over skeptics and gain the support of an executive committee. But winning financial support for social marketing is no different than winning support for any other business initiative – you have to prove its value to the organization.

Chart: How organizations perceive social media marketing at budget time



 MarketingSherpa ©2010

Source / Methodology: MarketingSherpa Social Media Marketing Benchmark Survey / Fielded Nov 2009, N=2,317

Considering that social marketing is at a very early stage in its lifecycle, a 7% confidence rating indicating it is producing measurable ROI and should be funded liberally is outstanding.

Conservative budget increases by half of all organizations at budget time, based on the promise that social media will eventually produce ROI, demonstrate another vote of confidence in the tactic for the longer term.

The 17% of organizations who still believe social media marketing is basically free, and should stay that way, are destined to get what they pay for.

THE SOCIAL MARKETING ROAD MAP DEFINED

A METHOD FOR MAPPING AN EFFECTIVE SOCIAL MEDIA STRATEGY

Developing an effective strategy for integrating social media into the mix is a significant obstacle to the successful adoption of social marketing. Seeing the need for a practical method for overcoming this obstacle, MarketingSherpa created the Social Marketing ROAD Map. Using this methodology to develop a strategy gives marketers the ability to make winning decisions. The Social Marketing "ROAD" Map is an acronym for the following four elements:

Social Marketing **ROAD** Map

- Research**

Gather intelligence on target audiences, social use and competition.
Stop, look and listen – it's the first step to an effective social marketing strategy. Profile your target audiences and their social characteristics. Monitor their dialog and how preferred platforms are used. Benchmark brand popularity, share of voice and other qualitative and quantitative social metrics for your company and competitors. This is an opportunity to also assess your organization's existing resources, communities and digital assets that will add value to your strategy.
- Objectives**

Define objectives aligned with target audiences and social metrics.
Forget about soft objectives like "increasing awareness." Achieving hard, measurable and targeted objectives is the only way to win over social marketing skeptics who control the budgets at your organization. Segment, select and prioritize target audiences by social status. When possible, align objectives with metrics traceable to financials like ROI, cost-per-lead and sales conversions rather than qualitative measures like sentiment. There are a variety of free tools (Google Analytics, Social Mention, etc.) and commercial analytical solutions for providing the quantitative tracking data required.
- Actions**

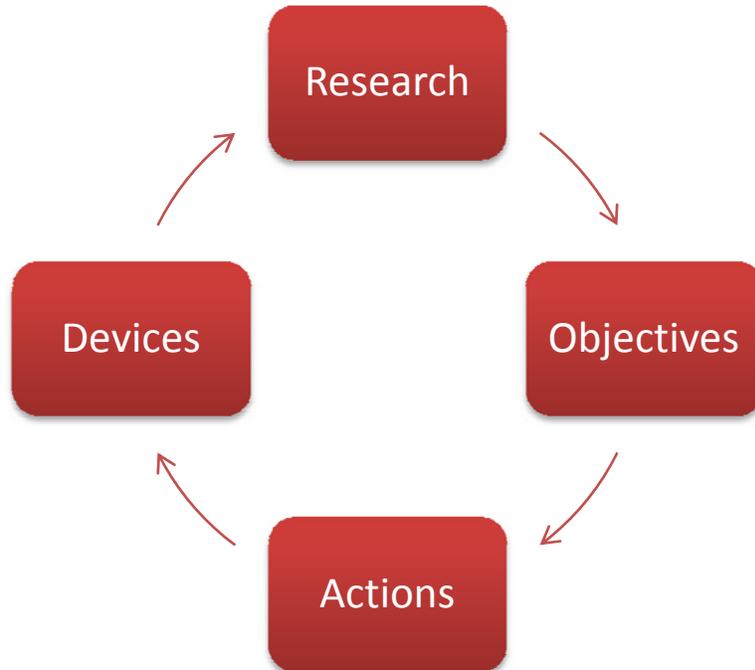
Create a social marketing strategy with a tactical plan of action.
Once you have established targeted and measurable objectives, you will need to plot a course of action toward achieving the desired outcomes. This section will specify the social marketing tactics, implementation timetables, campaigns and best practices, roles and responsibilities, policies and procedures, and budgets your strategy will require. It will also define your social marketing architecture – the pathways for connecting target audiences and conversations to content hubs, landing pages and conversion points.
- Devices**

Select platforms by their tactical effectiveness and architectural fit.
An effective strategy is expected to outlive the brief lifespan of today's popular social platforms. Therefore, your ROAD Map to this point has been technology brand-agnostic. But now is the time to identify, assess and select the appropriate social platforms (or Devices) that fit effectively into your current social marketing architecture. If a social network is appropriate, will it be Facebook or LinkedIn? Do you need to build a private customer service forum or will a Twitter account be a better solution. These are the final questions your strategy will answer.

THE SOCIAL MARKETING ROAD MAP IS A CONTINUOUS IMPROVEMENT PROCESS

The Social Marketing ROAD Map is a four-step process for creating an effective strategy. The process is not linear, it is circular. It is a continuous process for improvement that grows more powerful with each cycle. The Japanese coined the term “Kaizen” for the continuous improvement process, or the never-ending effort to improve products, services and processes. In this case, we use Kaizen as a never-ending effort to improve the results of your social marketing strategy.

THE SOCIAL MARKETING ROAD MAP CYCLE



The Social Marketing ROAD Map cycle initially begins with Research, or gathering intelligence on your social marketing situation prior to developing your strategy. Once the initial cycle is complete, it begins all over again at the research step by gathering intelligence, not only on the current social marketing situation but, on what worked and what didn't during the previous cycle.

AS SOCIAL MARKETERS MATURE, THEIR PRIORITIES CHANGE DRAMATICALLY

Earlier in this handbook, you determined which phase of social marketing maturity you are now in and how you stacked up against other organizations. This chart provides a break-out for each of the critical factors to social marketing success (or ROAD Map elements) by phase of social marketing maturity.

Chart: ROAD Map elements prioritized by phase of social marketing maturity



Source / Methodology: MarketingSherpa Social Media Marketing Benchmark Survey / Fielded Nov 2009, N=2,317

For organizations in the Trial Phase, we see most organizations focused on Devices (social media platforms). We see the focus shifting to Research in the Transition Phase and to Actions in the Strategic Phase. The key takeaway here is that emphasis on Devices drops from the top line to the bottom as an organization's social marketing maturity evolves.

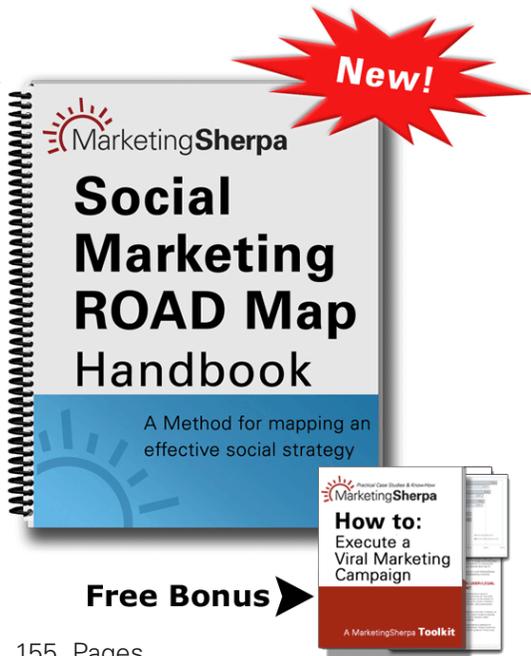
LET'S GET STARTED!

The stage is set and you're ready to get started. The following four chapters of this handbook are designed to provide a step-by-step methodology for mapping your social marketing strategy. This strategy will be the compass that guides you through the unfamiliar terrain ahead to social marketing success. Good luck!

Fax form to: (401) 247-1255

Special Pre-Launch Discount: Save \$100 + Free Bonus Gift

(Release Date: First week of June)



155 Pages
ISBN: 1-936390-00-0

Free Bonus

1st Edition Includes:

- 27 real-world examples of what works
- 11 case studies from leading companies
- 20 charts and tables
- 3 special reports
- 9 checklists and worksheets

YES! Please email me my PDF instant download, plus ship my bonus printed-and-bound 155 page copy when available. I'll pay only \$297; plus shipping and handling. My order is risk-free because it's covered by MarketingSherpa's 100% satisfaction guarantee. Plus, send me a free PDF copy of How to: Viral Marketing toolkit.

YES! Please email me my PDF instant download. I'll pay only \$247. My order is risk-free because it's covered by MarketingSherpa's 100% satisfaction guarantee. Plus, send me a free PDF copy of How to: Viral Marketing toolkit.

First email my PDF copy to: _____
(we respect your privacy)

Then mail my printed copy to:

Name _____ Title _____

Organization _____

Address _____

City _____ State/Prov _____ Country _____ Zip/Postal _____

Phone (in case of questions) _____

Charge my: MasterCard Visa AMEX

Card# _____ Exp. Date _____

Print Cardholder Name _____

Signature _____

OR Bill Me* Check Enclosed to MarketingSherpa LLC

About MarketingSherpa

Praised by The Economist, Harvard Business School's Working Knowledge Site, and Entrepreneur.com, MarketingSherpa is a research firm publishing benchmark data and how-to guidance for marketing professionals.

237,000 marketers read our exclusive Case Study newsletters every week, and thousands attend our annual Summits on email, subscription sales, and b-to-b marketing.

100% SATISFACTION GUARANTEE

MarketingSherpa guarantees your satisfaction. If anything we sell doesn't meet your satisfaction, return it for a 100% hassle-free refund immediately!

MarketingSherpa LLC
499 Main Street, Warren, RI, 02885
Phone: 877-895-1717
(if outside the US call 401-247-7655)
Fax: (401) 247-1255

* Billing: I understand I will not receive the Guides until payment is received

Fax form to: (401) 247-1255