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# Proposal for a Social Media Strategy and Implementation Plan for Icertis

Prepared for Icertis, Samir Bodas and Sanjay Menon

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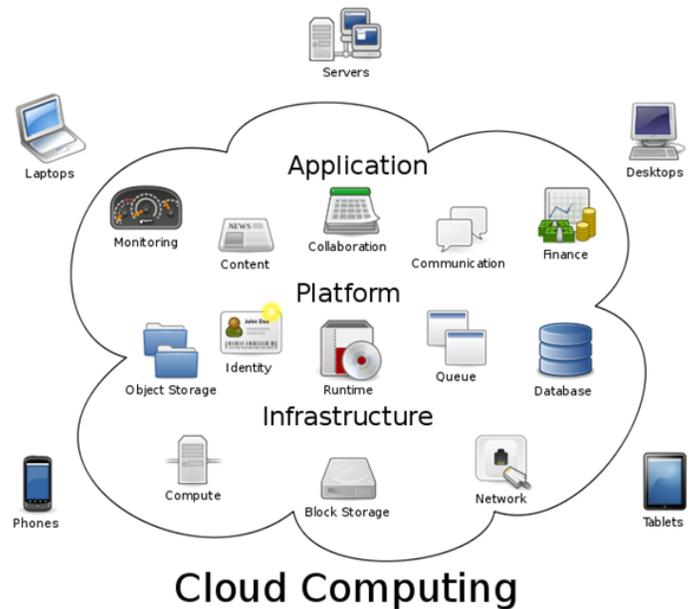
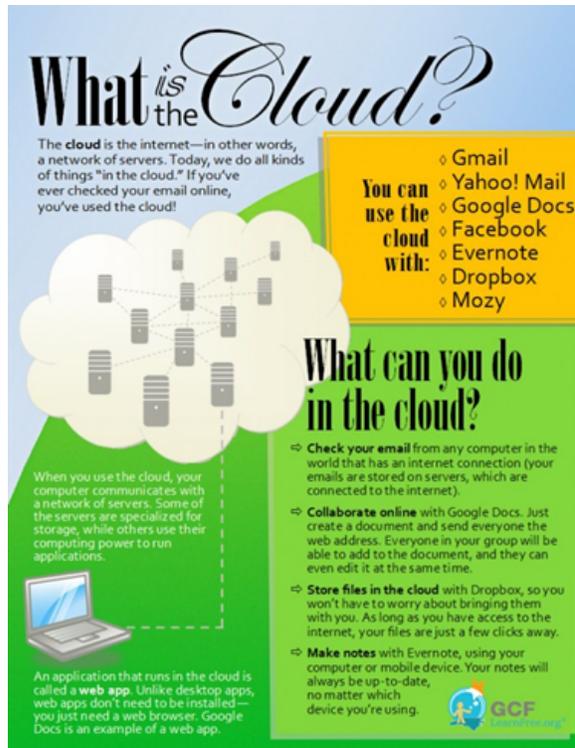
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## Executive Summary

Social media strategy and implementation plans were developed for our client, Icertis. Icertis, based in Redmond, WA and Pune, India is a Microsoft partner that develops business applications for the Azure platform. Current applications include solutions for contract management, document management and fleet management for Fortune 100 and 500 companies. In the past, the majority of lead generation and business development by Icertis has been done at the Executive suite level. While this is a very important way of transacting business, Icertis recognizes that a presence in the social arena is critical for building brand awareness as more cloud application developers enter the market. Using *The Dragonfly Effect*, developed by Jennifer Aaker and Andy Smith, a strategy was developed to extend Icertis's reputation as a cloud computing thought leader, increase brand awareness and improve lead generation into the social realm. The strategy provides recommendations to implement new media including a brand blog, developing Twitter personas for the brand, the CIO, CTO and the CMO, website optimization and enhancing existing Facebook and LinkedIn pages. We recommend a stepwise approach to increasing Icertis's presence in the social media arena. At the outset, we recommend setting modest social media reach targets, monitoring using free social monitoring tools and adjusting accordingly as goals are met. Lastly, we recommend that Icertis use an editorial calendar to manage and match social media campaigns with traditional marketing efforts for product launches and trade shows event.

# Cloud 101

What is the cloud? Where does it come from? What does it do?



Cloud computing is the delivery of computing and storage capacity for a community of users. The basic idea with cloud computing is that software, services and data can be provided to users over a network connection and through a web browser, light weight desktop or mobile app versus the old way of just running locally on a personal computer or network server. The idea and proponents of this say that the cloud helps with faster usage, improved manageability, less maintenance and allows users to adjust resources to meet any fluctuations and unpredictable needs that may arise to fit the demand. A simple picture of how the cloud works is the electric grid. It’s just one big, shared service.

Some big businesses are now making use of the cloud and have created different cloud environments for users; like Google, Apple, Microsoft, Amazon, Salesforce and IBM. Within these different clouds you have a combination of applications, platforms and infrastructure. Stuff like Google Docs (Drive) for your docs to iCloud from Apple for your music, movies, photos is some popular general usage

for storage and sharing for individuals and groups. But some companies are making more specific solutions in the cloud for bigger companies and governments even. This is called enterprise software.

They are making software that gathers and uses different apps such as content, collaboration, communication, monitoring and finance within the cloud. These services provided by enterprise software are typically business-oriented tools such as online shopping and online payment processing, interactive product catalogue, automated billing systems, security, enterprise content management, IT service management, customer relationship management, enterprise resource planning, business intelligence, human resource management, manufacturing, enterprise application integration, and enterprise forms automation. One of those businesses creating this type of enterprise software is Icertis.

(For more general information on the cloud and its future check out these great infographics:

<http://pinterest.com/markmilleritpro/cloud-computing-infographics/>)

## **Icertis 101**

Within the Microsoft cloud - Office 365 and Windows Azure, Icertis is currently the largest provider of enterprise business solutions. Their products and services suite of application software offers solutions for Contract and Compliance Management, Transportation Management, and Channel Partner Management. Icertis has an industry focus within the banking, insurance, logistics, manufacturing, retail and media industries. Besides offering software solutions and products for Microsoft partners and Fortune 500 companies, Icertis is also a Microsoft Cloud advisory for CIO/CTOs.

## Strategic Framework – The Dragonfly

The strategic framework we've chosen for Icertis takes into account two crucial facts about social media:

1. *Any successful social media campaign requires authentic, meaningful interactions with the prospective audience.* This is especially true for brands that want to use social media channel since individuals generally prefer to interact socially with other individuals and not brands.
2. *Social Media users are experiencing an increasingly large volume of content on their channels of choice.* A successful social media campaign, therefore, must stand out from the noise without adding to the user fatigue caused by the flood of content.

Jennifer Aaker's *Dragonfly Effect* captures what we feel to be the essential virtues for successful social media given the two facts above. This section of the report offers a brief summary of the Dragonfly strategic framework so that:

1. Icertis understands the specific social media recommendations that follow
2. Icertis has a foundation to develop future strategies beyond those offered in this report

In brief, the Dragonfly Strategy relies on four key “wings”:

1. **Focus** – Identify your target audience and create specific, short-term, measurable goals for that audience.

At this stage in the process, the objectives are to understand your audience and create specific, measurable goals tailored to them.

We can refine this step with the following acronym:

### ***H.A.T.C.H.***

**Humanistic** - Who is the audience, what are their needs, what language do they use, where are they?

**Actionable** – set short-term micro-goals that lead to long term, broader goals

**Testable** - identify the metrics that will demonstrate progress and help to revise your efforts

**Clarity** – make your goals as specific and clear as possible

**Happiness** – build your goals around the things that are meaningful to your audience

	Your Campaign:
<b>Human</b>	
<b>Actionable</b>	
<b>Testable</b>	
<b>Clarity</b>	
<b>Happiness</b>	

2. **Grab Attention** – Develop techniques that will draw eyes to the content you’re generating.

This part of the strategy is about drawing eyes to your content. It’s about getting people to notice you and your business.

**Personal** – Create with a personal hook in mind

**Unexpected** – Draw your audience in with curiosity. Find new ways to reframe what might be familiar content.

**Visual** – Show, don’t tell. Images and videos are easier to consume online.

**Visceral** – Tap into the emotions/senses of your audience. Music can do this well.

3. **Engage** – Create content that is compelling and meaningful to your audience, and engage them in conversation when they respond to your content.

This phase of the strategy is about connecting your content (and therefore your audience) with your goals. It’s about making your audience care about what you’re doing.

**Tell a story** – Find compelling, sticky stories to convey critical information.

**Empathize** – Listen to your audience. What is important to your audience? How does that relate to your campaign?

**Be authentic** – Let your love for your business and your passion for it come through in your campaign.

**Match the Media** – Understand the differences in how your audience uses different social media channels. Don’t send the same exact content through all channels. Align communication and context.

4. **Take Action** - Inspire your audience to engage in certain kinds of action and make it easy for them to do so.

**Call to action** – do you have an explicit call to action that tells your audience what they should do once they’re excited about you?

**What are you asking for and how are you asking it?** Whether you *ask* for or *require* participation should be based on two factors:

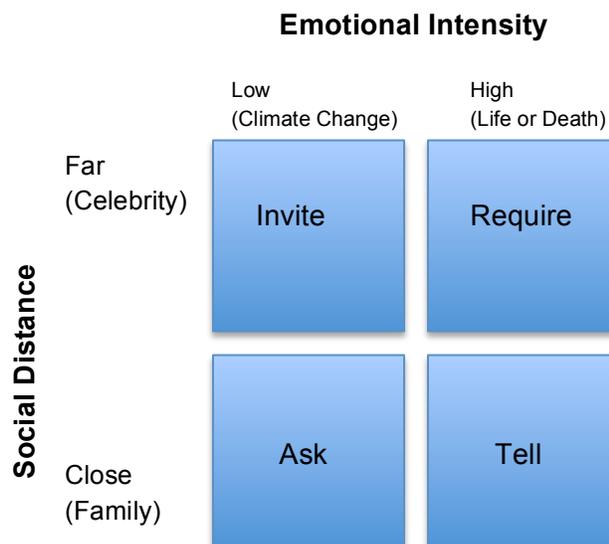
1. Your degree of separation from your audience (are you family? Or a brand they’re interested in?)
2. The emotional intensity of your ask (Is this a life and death issue?)

If you are family and this is a life and death issue, your call to action can *Tell* your audience what to do.

If you are family and you’re not talking about an intense issue, you should *Ask* your audience to perform an action.

If you aren’t related, and this is a life and death issue, your call to action can *Require* your audience to do something. The inhumane treatment of animals demands action!

If you aren’t related and you’re not talking about an intense issue, you should *Invite* your audience to perform an action.



**Whatever the action is, make it:**

**Easy** – Don’t make it complicated to perform the action and make the action concrete.

**Fun** – This is especially important for Brand Awareness.

**Tailored** – In the context of Icertis, tailoring is about locating and targeting content to influencers – to the parts of your audience that will spread the word

**Open** – Be open about your company and what taking the action you’re asking for means. Why should your audience take action X if they don’t know the consequences of taking it?

Underlying this framework are four further principles:

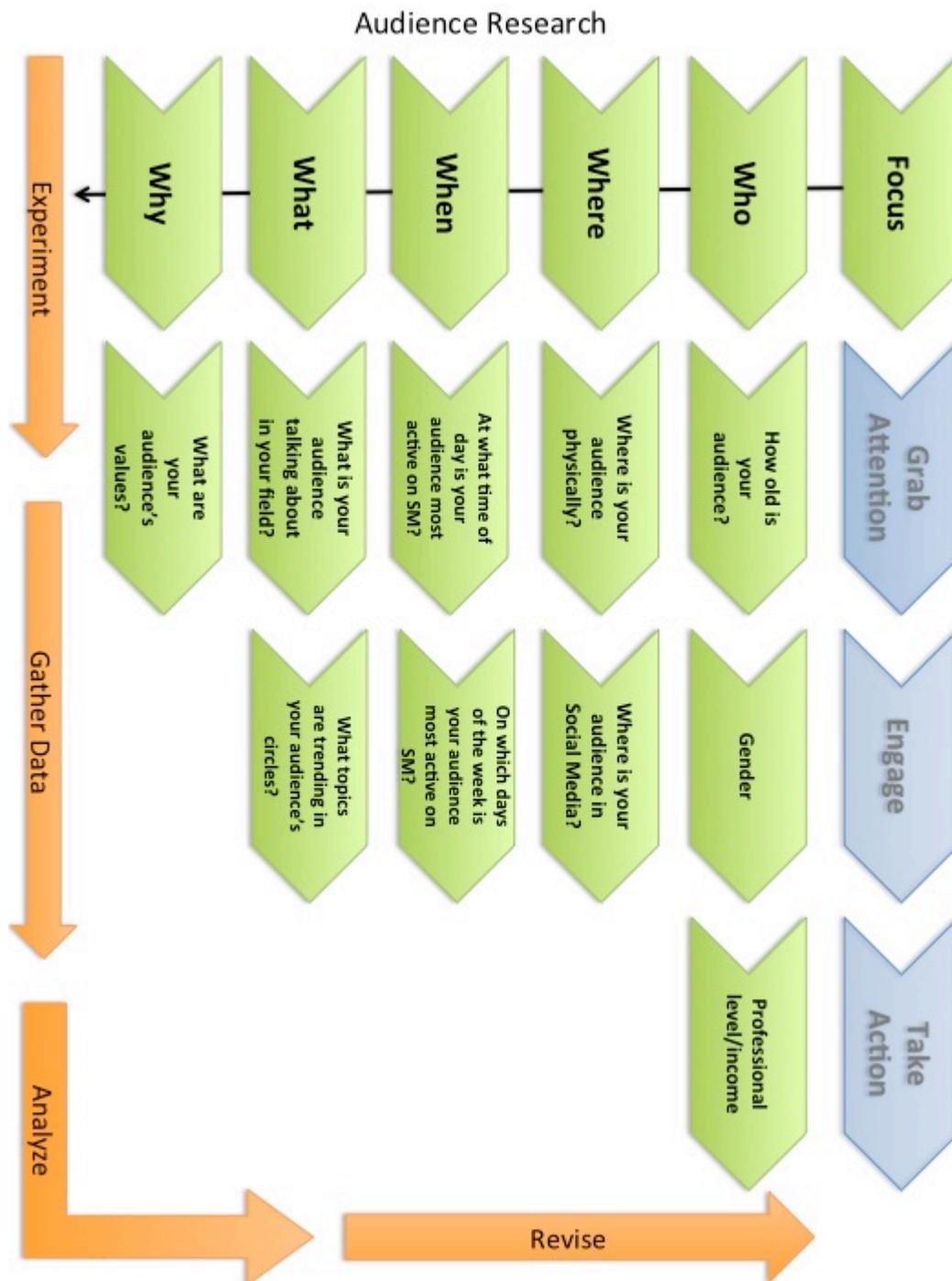
1. **Experiment** – While there are lots of general industry reports about various social media tactics, there is NO substitute for getting to know your specific audience. That will require some experimentation at the least on:
  - a. Content topics
  - b. Posting times/dates
2. **Gather Data** – Every social media campaign should be carefully monitored at each of the four wings. Collect data that will help you to refine the experiments you’re running and learn more about your audience.
3. **Analyze** – What does your data tell you about your audience and your efforts?
4. **Revise** – How can you adjust your tactics in light of the data you’ve collected?

We can’t emphasize enough the importance of this process. Because brands as entities have a greater challenge in establishing the kinds of personal relationships that social media requires, it is crucial to learn about your specific audience and create content tailored to their interests and needs. The EGAR

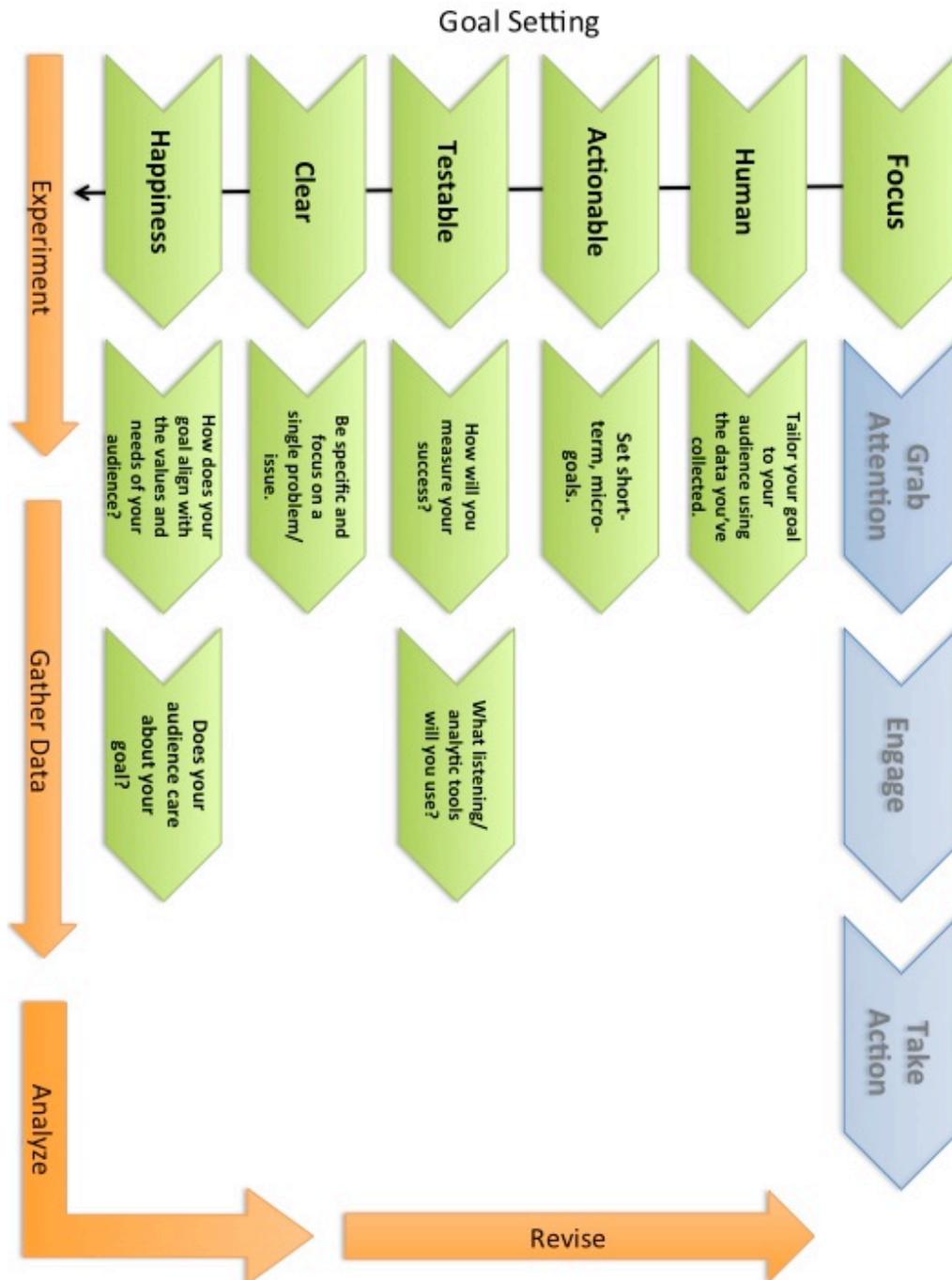
process is the best way to enable that kind of learning and connection with your audience.

The following diagrams lay out the Dragonfly strategic framework.

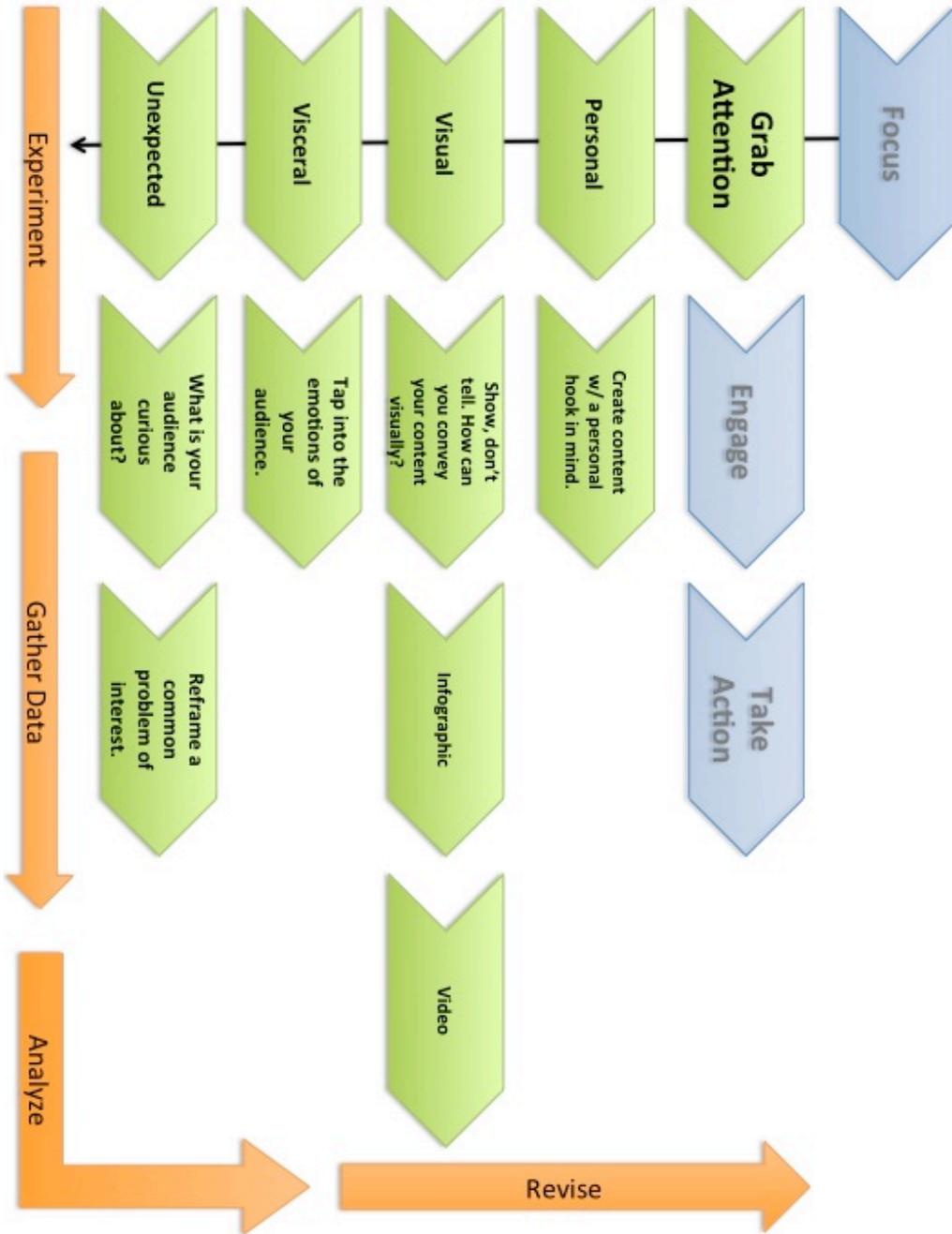
### Focus – Audience Research



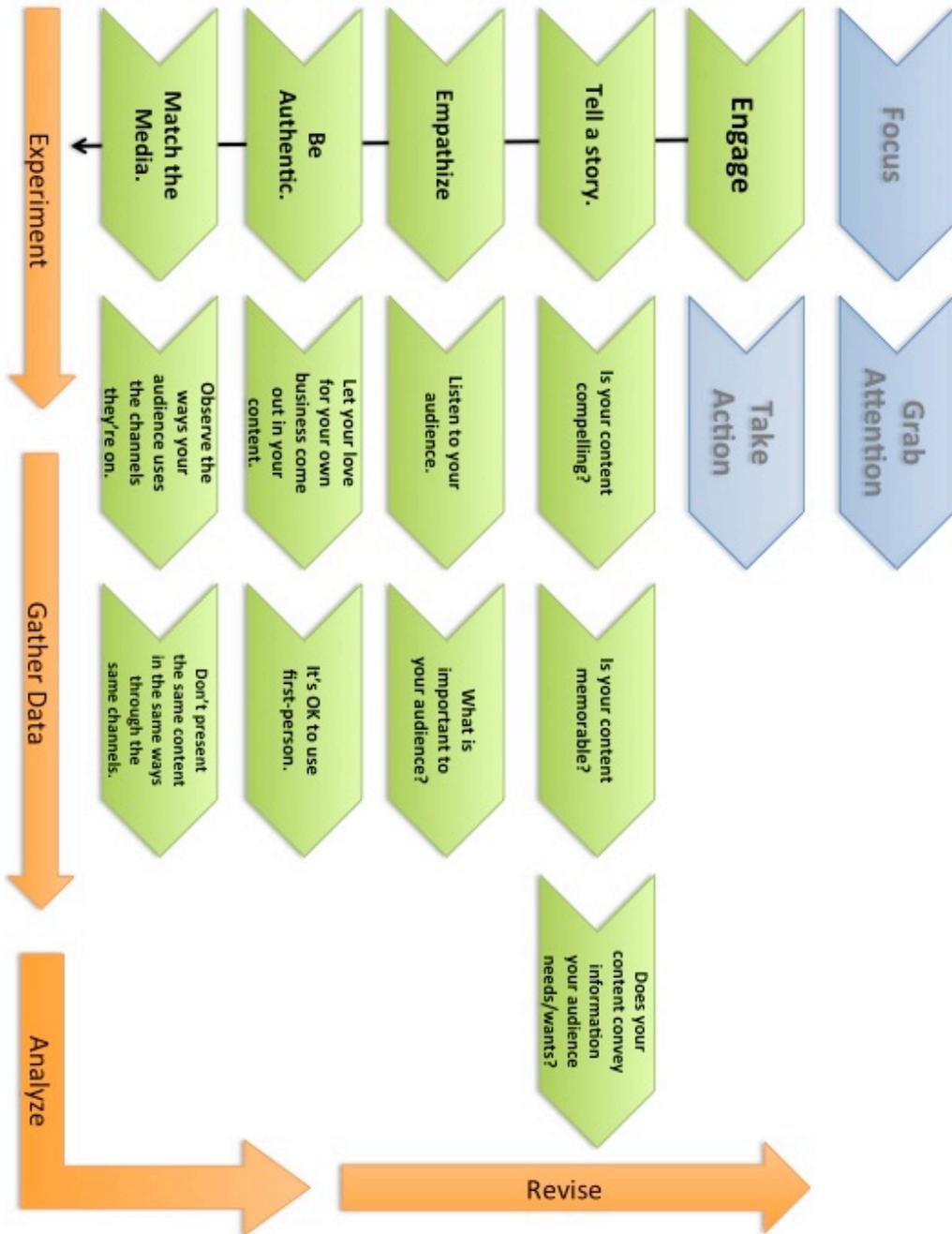
# Focus – Goal Generation



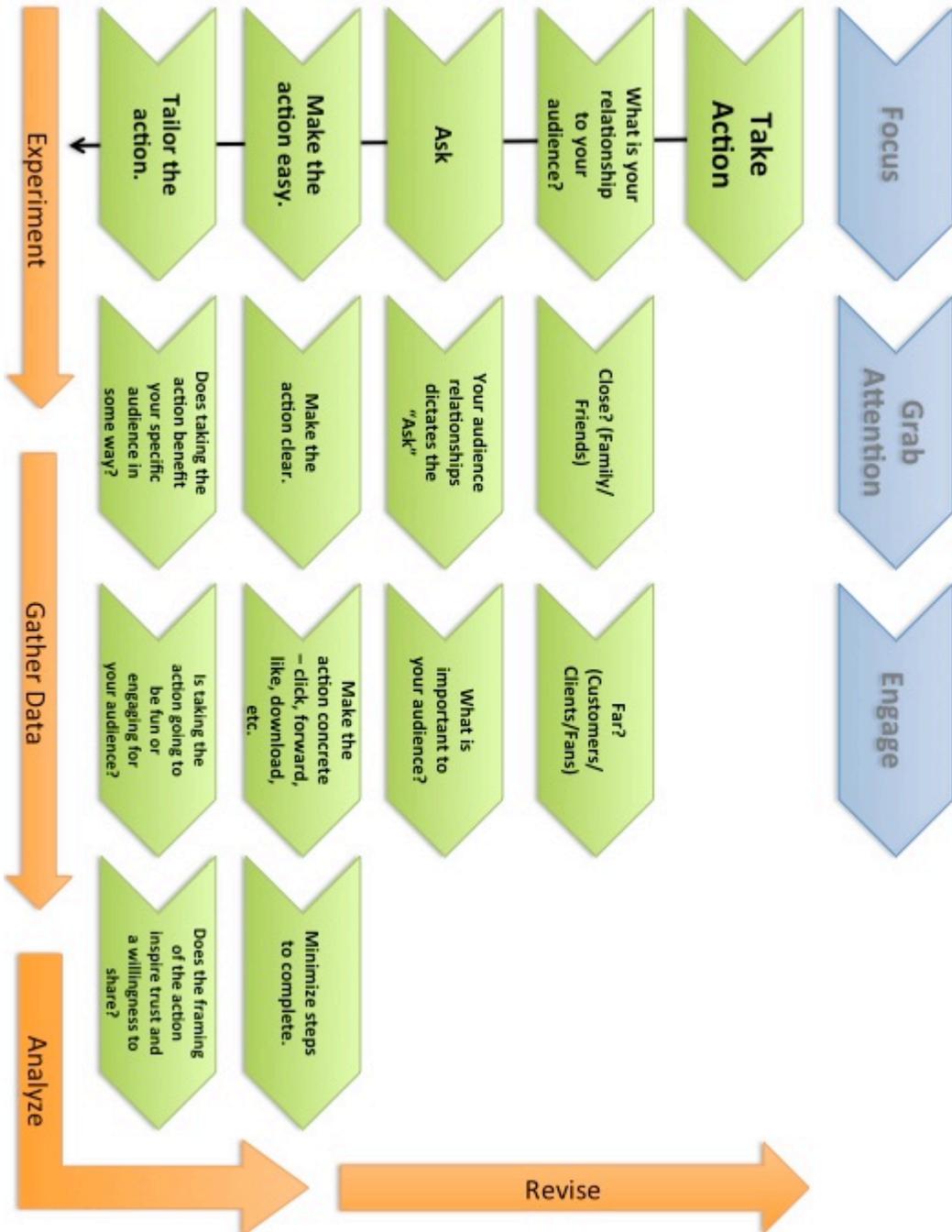
# Grab Attention



# Engage



# Take Action



## **Icertis Overarching Goal #1: Thought Leadership**

*Who are the target audiences for Icertis to direct their thought leadership messages?*

The leadership at Icertis has the unique opportunity to position themselves as innovators in the field of application development in the cloud through their demonstrated successes in contract and fleet management. Using the Dragonfly Effect method, we will lay out a strategy and set of tactics to establish the Icertis brand and its leadership as thought leaders within the cloud application providers and Azure platform communities. The audience focus for this goal is not necessarily their primary contacts for sales and contract negotiation, which is primarily done via email and word of mouth referrals (Santucci, 2010). Instead, the target audience for thought leadership includes other leaders within cloud computing, IT decision makers making influencing buying decisions, journalists and media covering innovations in cloud applications for potential story content.

There are existing experts and pundits covering the technological aspects and road ahead for cloud computing technologies (See Appendix A). Our goal is to develop a focused social media strategy to showcase Icertis's ideas and experiences that set them apart from other that will help decision makers evaluating technologies and products in an increasingly competitive market place.

The person or persons who will serve in this role must be engaged, motivated and comfortable on social media. While they may speak as the voice of Icertis, they can let their own personalities show through in their writing style and in the way they engage with their potential followers in social channels. Below we will discuss some measurable goals to target specific audiences.

### **Goals**

Since Icertis and its products are being used by the Azure communities and have a good stable of existing clients, they should initially target companies and technical representatives of companies currently evaluating the use of cloud

resources to host and manage their enterprise solutions for contracts and supply chain logistics.

This tier of IT evaluator may be called upon by the Chief Technical and Information officers to evaluate the current and future needs of their companies shrinking IT budgets for equipment maintenance and replacement. This coupled with needs of the distributed workforce to retrieve documents and data anywhere and anytime without relying on a company VPN or stovepiped solutions make Icertis' products and services a potential solution.

This population of decision maker relies on several sources of information to evaluate products – white papers, technical specifications, easy access to sales associates or market specific information or account representatives. They may also potentially crowdsource information by going to social media or community forums to pose questions or gather information before starting a more detailed survey of the market.

## **Focus**

Engage with potential IT technical followers via social media channels. Seek out twitter lists of well know tech writers, pundits and commentators and begin to follow them on twitter and engage with them. Measure the success of your engagement by seeing an increase in the number of twitter followers, number of retweets of relevant Icertis content and number of favorite tweets. Follow brand twitter feeds and relevant personnel (CTO, IT specialists) using lists and monitor their conversations.

Press and media contacts and leads have traditionally been done by phone calls and through public relation companies. Social media allows both the press and the company to put their story and their desire for content out in the public. Press will often pose a question on Twitter or Facebook looking for companies or individuals who might have knowledge or information about new technology or innovations. Icertis can monitor for these mentions via social media and reach out to these individuals using social messaging to generate potential press mentions that will elevate the brand. Engage potential media followers with twitter and follow their blogs, monitor for mentions and story ideas. Measure

success if media types are following the Icertis brand and the Icertis individual industry leads or leadership.

## **Grab Attention**

Content has to be relevant to your audience. In this case, targeting IT and tech evaluators, Icertis need to make sure they are creating content that speaks to each audience. Infographics embedded into blog posts and made shareable to other social media sites as well as via email. Infographics that demonstrate the capabilities of Icertis' to successfully conquer a specific vertical and comparing it to the old way of doing business would be one idea. Visualizing the increase in cloud computing applications and addressing issues of security, portability and seamless transition would be another. Making the infographic compelling and easily understood will generate its own buzz. Success can be measured by the number of shares, comments and downloads of the infographic. If possible, try and place as much brand specific information on the infographic.

Blog posts that cover topics that are relevant to the industry, futurecasting, editorializing and success stories are likely to be read by individuals who have subscribed to your blog feed via RSS. Another method of publicizing blog posts is via social channels. Make mention of blog posts and with a teaser about the content on Icertis' twitter stream and on the brand Facebook page. Make sure the blog post has share buttons and like buttons and encourage readers to contribute information, especially by posing questions and starting conversations. Use results from conversations, to drive and create new blog postings. Measure success by increasing number of blog followers, use trackbacks and mentions. Mention something about adjusting number of times you will post based on feedback.

Potential Blog Post topics that connect Icertis to the larger cloud community and demonstrate how Icertis can address concerns and help provide novel solutions are listed below.

- Introducing the Company – Icertis as a brand and the concepts of launching enterprise solutions on the cloud (can be a little more folksy and personal)

- Icertis – Our Mission
- How Cloud Computing is addressing Information security
- How Cloud Computing is addressing Data Protection
- Contract Compliance and Contract Management in the Cloud
- Data Concerns – transmission of data in and out, is my data going to be intact?
- How the cloud provides flexible business solutions for various industries including Banking and Insurance, Logistics, Manufacturing, Retail, Entertainment (Festivals)
- Icertis offerings -Cloud - On Premise Content Integration
- Icertis offerings - Cloud – Application Migration
- Icertis offerings – Cloud Device Application Development
- Cloud computing and Big Data
- How Icertis has transformed various industries – focus on clients and success stories
- How easy is cloud implementation – link in with other business partners, link in with Azure
- The cloud – the road or sky ahead
- Upcoming events – where Icertis will be next
- Reviews or Icertis’s take on industry and research reports on Cloud Computing and Cloud and Application management

(For further blog topics, please refer to the *Content Idea Generator* listed in Appendix B.)

Blog content will keep your appearance as thought leaders in the eyes of the industry. Compelling and up to date content is important. As you begin blogging, it is okay to repurpose older white papers and slide decks to build up a body of content. At the same time, continue to work on developing new leads, commentary and content based on current events and trends in cloud application development and success stories. Michael Hyatt, a successful media strategist does a great job of breaking down the components of a blog post that makes it effective, readable, and compelling. The main points he makes are to make the posts short – between 250-500 words; use a lead paragraph; make it personal; use images (or infographics) that pertain to the topic; and ask questions to engage your audience (<http://michaelhyatt.com/anatomy-of-an-effective-blog->

post.html, last accessed May 29, 2012) . Hyatt provides a blog template to download. While he does not address content discovery, Icertis can grab attention and increase visibility of blog posts by making titles and searchable words compelling and focused in terms of the SEO. For example, keywords at the beginning of the blog post titles will boost their rankings in search engines. Prominent placement of social sharing buttons, such as at the top of each post, can increase the likelihood that the reader will share out the content if they enjoyed the post and thought it would be worth sharing with their networks.

## **Engage**

Via social media – As stated before, the blog and blog content will be the best vehicle to demonstrate thought leadership. Create content that will discuss novel ways of reframing old problems, identify problems that have yet to be addressed and highlight novel solutions to current problems. Continue conversations with blog readers by replying to post comments and via social media channels.

Engage in person – Create your own or sponsor events that emphasize cloud technology and enterprise solutions. Use social networking channels to publicize them. Locally, involve Icertis in the MIT Enterprise forum, GeekWire events, and Microsoft events on campus. Icertis should host or sponsor open houses to take advantage of Icertis product releases, either at tradeshow or at a local venue. Track conversations that happen during these events (if you are encouraging social media sharing during event) by creating a hashtag specific to the event and actively monitor during event and engage and retweet as necessary.

## **Take action**

While you provide relevant content that drives traffic towards Icertis due to the great ideas that you have put out via thought leadership, you can encourage your followers to do the same for you by asking them to retweet content (without sounding desperate), subscribe to blog and share content via social means (be sociable and share buttons on blog posts), encourage commenting and draw them to your other social channels – Facebook and LinkedIn brand pages.

Using guest bloggers and discussing recent industry reports is a good way to draw readers who are looking for new voices or spin on information on industry recommendations. Often guest bloggers are happy to gain exposure to new communities and it relieves some of the burden of your main bloggers, especially during holiday times or busy tradeshow periods.

## **Icertis Overarching Goal #2: Brand Awareness**

Icertis needs to build a brand that reflects who they are as a company and the expertise that they have in the cloud management industry. During our meetings with Icertis, we have determined that Icertis is the leader in this industry and thus would only be fitting for them to establish themselves as thought leaders. While Icertis has been relying on their existing contacts at Microsoft for sales leads, having a strong brand awareness can expose them to the larger technology community and in turn, help them expand their clientele.

Part of building an effective brand is to have a presence in the major social media channels, especially in the technology industry. Currently, Icertis does not have a presence in social media.

### **Strategies**

To begin building a strong social media presence, Icertis first needs to create profiles in the most popular social media channels - Facebook, Twitter, LinkedIn and YouTube; as well as create a blog. Part of making this social media campaign successful is consistency and regularity. Icertis should update its social media channels regularly.

In addition, it is important for Icertis to develop a “voice” in these social media channels. As the leader in the cloud management industry, Icertis should adopt the “personality” of a thought leader and an expert in this subject matter. In developing contents for its social media channels, we recommended that Icertis contribute content relating to the industry and new developments within cloud management, as well as more lightweight content that will allow its followers and readers to get to know Icertis on a more personal level.

Of all the social media channels that were recommended for Icertis, Icertis should focus more on LinkedIn and Twitter, given its business-to-business (B2B) nature. People are more likely to use LinkedIn for professional purposes and the industry influencers (ie. Tech bloggers, tech publications) are active on Twitter. Additionally, Icertis could host quarterly webinars related to cloud management

to be uploaded to YouTube, or upload its executives' tradeshow and contention speeches to its YouTube channel as well.

Aside from regularly providing content, Icertis should also make its tradeshow and convention schedule known to its followers, and incorporate social media at these events. One way would be to live tweet during the event and to follow other organizations and professionals who are also at the event. Then, Icertis could do a short video montage of the event and upload it to its YouTube channel shortly after.

Although social media is important for the business, Icertis should also redesign its website with an "icertis.com" domain. This will project a more professional image for Icertis and will impact its Search Engine Optimization (SEO) efforts. A quick search on Google for "cloud management" does not yield results for Icertis' website. Apart from having an "icertis.com" domain, Icertis could also ensure that important keywords such as "cloud", "cloud management" are in its landing page.

## **Grab Attention/Engagement**

While it is important for Icertis to provide regular content to its followers, it should also be able to engage with its followers and grab the attention of its readers. To invite engagement we recommend that Icertis end its blog posts with a question, or invite its readers to share their thoughts and comments on the subject matter. Also, in addition to providing regular well-informed tweets, Icertis should also engage in conversations with other thought leaders in the industry, or retweet tweets that are informative and useful. While Icertis is maintaining its expertise "personality" on social media, it should not be perceived as arrogance.

## **Measurement**

To measure the effectiveness of its social media efforts, Icertis could track increases in Twitter followers/retweets over the next three months, its increase in the number of Facebook 'likes', its YouTube video viewing and subscriber counts, as well as Google Analytics on its website.

## **Tradeshows, Social Media and Icertis Brand Awareness**

Aside from regularly providing content, Icertis should also make its tradeshow and convention schedule known to its followers, and incorporate social media at these events. One way would be to live tweet during the event and to follow other organizations and professionals who are also at the event. Then, Icertis could do a short video montage of the event and upload it to its YouTube channel shortly after.

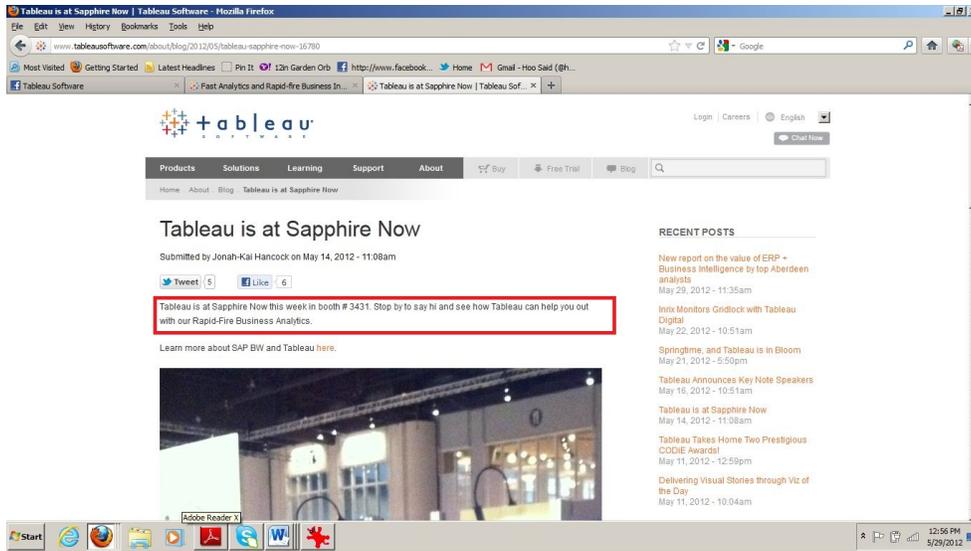
Tradeshow and events are where Icertis puts a lot of current efforts and investments into brand awareness. In the past few months, Icertis has attended three large tradeshows and conference, either as a vendor, or as a conference speaker. These opportunities are great ways to build awareness of the technology and Icertis brand through solid booth visuals and demonstrations on the tradeshow floor; arranging meetings between potential customers and industry and technical specialists and currying and keeping current clients in the loop about updates to the technology. Like many marketing efforts, Icertis can use an editorial calendar to promote their appearances at conferences and tradeshows before the event, keep conversations flowing during the event, and follow up with potential clients and leads using social channels after the event.

Icertis will be attending the *Microsoft Worldwide Partner Conference* (MWPC) in Toronto, Canada in early July 2012. This information is well displayed on the Icertis web page, but no mention of this event is seen on their Facebook brand page or their LinkedIn Page. In the five weeks before the event, Icertis could send out press-release that can be repurposed to a mail message or a newsletter blurb about the conference and to have clients, potential clients and the press to come meet them in person. If the CIO or CTO are speaking, make sure that this is also mentioned. Currently, the upcoming EdTech Conference announcement is the banner image on the Icertis home page. As soon as the event is over, replace with the MWPC banner and have it run until the tradeshow is over. The Icertis Facebook page should link to the tradeshow page including liking the tradeshow

event page. The Icertis Facebook page should also add a tab at the top of the brand banner that links to upcoming events. Additionally, the Facebook page is a great place to pose questions and ask attendees for what they want to see or do at the conference. This should bring more people to the Facebook page. The same tactics can be applied to the LinkedIn page to each member of the Icertis Team who will be attending the MWPC. Status updates directly from the LinkedIn page can also be shared out to Twitter followers.



Before the event, have the Icertis brand follow other speakers, companies and the tradeshow Twitter stream. Engage in conversation, monitor for mentions and if comfortable, thank engagers who interacted with speakers or with the brand on the tradeshow floor in person. Use the company blog to highlight events at the tradeshow, give specifics including booth numbers and schedule of demos and events taking place.



Giveaways of promotional products are good ways to get people to come and visit your booth. While we are not advocating giving away a high value item, such as an iPad, giving away a t-shirt or a gift card twice a day is a nice way to encourage people to stop by. Information about this giveaway is easily disseminated via Twitter and early buzz can be generated via Facebook posts. Use Twitter to announce winners and continually emphasize booth location and use conference specific hashtags.

[Tableau Software](#), a data visualization company based in Seattle, Washington, does a great job of creating a pre-conference social media presence and continues the engagement throughout the conference with a minimal number of twitter post (five or less). Their Facebook brand page prominently displays their upcoming events in the banner image and their events tab. The same concepts are repeated in their LinkedIn brand page. During the conference, they interact with attendees and remain upbeat and personal. They are a great example of how a company uses social media to engage and draw in attendees who may have not been aware of their brand or services before the conference, but might make more of an effort to do some follow up research after visiting their booth.



Post-tradeshaw follows ups with leads and potential partners should include responding to LinkedIn requests and media requests. Make slides and presentations given by researchers, management or other Icertis employees available for download and track number of downloads and trackbacks via Adobe Connect.

## **Icertis Overarching Goal #3: Lead Generation**

### **Focus**

*Who are Icertis's potential leads?*

Icertis's potential leads can be recognized in the top executives (CXOs, VPs, Directors) of companies operating in banking and insurance, logistics, manufacturing, retail and media industries. These are the decision makers and Icertis's sales contacts. Social media will help to better identify these decision makers, as well as engage with them and drive them to the pipeline.

Consulting a variety of studies we discovered a quickly changing scenario where social media seems to have a lot of potential. According to the IBM Global CEO Study released on May 2012, for CEO's, social media is the least-utilized method for connecting with their audiences. The hierarchy of connecting is as follows: face-to-face interactions, websites, channel partners, call centers, traditional media, advisory groups, and then, finally, social media. However,

- Although only 16% of CEO currently uses social business to connect with customers
- The number is poised to spike to 57% within the next three to five years

Some social tools are in fact already spread out among top managers. The study "The New Symbiosis of Professional Networks" (November 2011) by the Society for New Communication Research points out that:

- 93% of CEOs, directors or managers participates in professional networks or communities as LinkedIn
- 65% participate also in open social network such as Twitter

It's even more interesting to learn that social media is helping them in the decision making process. In fact, according to the same study:

- 80% use social media to identify trends and key topics for further exploration

- 80% are able to accelerate decision process and information/strategy development by participating in communities

We can therefore identify LinkedIn as the primary social tool used by Icertis's potential leads. Twitter is also progressively gaining momentum in some industries Icertis operates in, as banking, insurance and media.

From LinkedIn, we know that (from LinkedIn website)

- In 2011 the social tool was able to generate over 149 million business leads in India and 212 million in US
- In India 1 out of 5 leads was a business decision maker, in US the ratio was 8 out of 10
- 46% of LinkedIn users in India and 43% in US are on LinkedIn to learn more about products and companies

If we restrict the look to the IT professionals, we learn that:

- Over 88,000 IT leaders are on LinkedIn
- 50% of executives rates LinkedIn a good resource for finding recommendations for enterprise software products
- 24% of C-level IT executives state that information on LinkedIn had directly influenced a recent enterprise software purchase decision.

Despite this data, we can't forget that when it comes to creating business contacts, Icertis's potential leads still rely on the traditional tools. According to the study... by Forrester Research)

- 46% still consider email the preferred channel with vendor sales person
- 78% initiate a meeting after a direct referral
- 72% schedule a meeting after having already looked actively at the product the vendor sells.

Conclusions:

LinkedIn is the most widespread and trusted social tool among Icertis' potential leads. It helps them to learn more about new products and make purchase decisions.

When it comes to scheduling a meeting with vendor, CXOs prefer to be contacted by email, have referrals and look at the product prior to meeting.

Therefore, Icertis's short-term social media goals will be:

- 1) Increase by 25% the number of followers among potential leads on Icertis's LinkedIn page within the first month of social media activities
- 2) Increase by 25% product demo downloads within the first month of social media activities

## **Grab Attention**

According to LinkedIn analytics, currently Icertis's page has 270 followers. 106 of them are employees., Just six of those employees are in US, and the rest are in India. The page is mostly used for recruiting purposes.

In order to increase the number of followers among leads (as goal number 1) Icertis will need to improve its presence on LinkedIn. Keeping in mind that LinkedIn is a network of more than 161 million registered users, 2 million company pages and more than one million Groups, how can Icertis grab the attention of potential leads?

### **1) Exploit all the opportunities of a company page.**

LinkedIn's company page should be more than a recruiting tool. It should be much more like a company's complete professional profile. LinkedIn provides the opportunity to integrate rich media content such as images, hyperlinked banners, links to the website and blog, and videos from YouTube into the company profile. It's important to take advantage of these benefits to make the page more attractive, engaging and interesting. Also, LinkedIn pages can be customized for distinct audience segments. This is an important feature to keep in mind and use strategically according to the different industries Icertis operates in.

To enhance Icertis's existing LinkedIn company page, it's important to focus on the following:

- Populate the company overview page using informative descriptions about Icertis's customers and how the company serves them. Also, pull in Icertis's blog posts (once the blog is established). The admin panel for your LinkedIn company page has a field for your blog's feed URL. In addition, be sure that the company website address is displayed prominently to invite potential leads to download the product demo (as goal number 2).
- Post frequent status updates to the company LinkedIn page regarding Icertis but also all the cloud computing industry that followers can comment on, share and like. The updates will show up on followers' LinkedIn homepages as well. In order to engage the potential followers, the content should be always original.
- Build a products and services pages. On these pages it's possible to include an image, description, list of key features, links to your product landing pages and promotions, and even embed a YouTube video. Videos can appear both on the products and services overview page as well as on each individual product/service page. Integrating as much rich media as possible is a good practice since it will liven up the company page significantly. A good tactic to build social proof around the products and strengthen business partnership is to seek recommendations for the products from LinkedIn network.
- Take care of the career page and don't forget to check your LinkedIn page analytics regularly to see who has engaged with or commented on any of the company updates.
- Consider LinkedIn advertising as Partner Messaging and Display Advertising especially in the launching phase.

Example: Microsoft LinkedIn page with videos and product descriptions (located [here](#)).

The screenshot shows the LinkedIn interface for the Microsoft company page. At the top, the LinkedIn logo and account type 'Basic | Upgrade' are visible. The navigation bar includes 'Home', 'Profile', 'Contacts', 'Groups', 'Jobs', 'Inbox' (with a notification badge), 'Companies', 'News', and 'More'. A search bar on the right contains the text 'Free Websites - Create a Website For Your Business. Free, Easy, Simpl'. Below the navigation, the page is titled 'Companies > Microsoft'. The 'Products' tab is selected, showing a 'Welcome to Microsoft Products and Services' message. Below this is a 'Microsoft Product and Service Spotlight' window featuring an advertisement for Microsoft Office 2010 with the text 'simplify everyday tasks' and a 'GET A FREE TRIAL' button. At the bottom, the 'Featured Products and Services' section highlights 'Windows 7 Professional' with '228 recommendations'.

## 2) Create a LinkedIn Group

LinkedIn Groups offer a tremendous and powerful platform to businesses. They help to create a community around a brand and its products. But, as much as they serve to promote a business, they need also to add value. How is it possible to balance promotion with community building and value?

- Create valuable, branded content that your prospects will view as a real resource. This kind of content typically includes:

Articles (Blogs)

White Papers

Case Studies

How-to Videos

Free Reports

Webinars

Infographics

When you balance the promotion of other people's content with your content, people will stay extremely engaged in your group.

- Use the “Announcements” strategically. LinkedIn group owners have the ability to send “Announcements” to all group members, up to once per week. Some case studies show that LinkedIn Announcements help boost the number of leads generated not only for the day of the send, but also the days following. To take advantage of the Announcements it's important to create an email marketing strategy with personalized and compelling messages and a call to action.

(Dell case study) <http://linkedselling.com/case-study-dell-builds-brand-equity-with-business-solutions-exchange-linkedin-group/>

Dell has proven the power of LinkedIn Groups to establish authority and generate the right leads with their group Business Solutions Exchange. Started in June 2010, the group now stands at approximately 8,000 members. What's more important, the group is full of Dell's most valued prospects. [Here](#) is their case study.

## **Engage**

To increase the number of followers (as goal #1) it's important to engage them in an authentic and compelling discussion both in Icertis's company profile status updates and in Icertis Group posts. Here are a few suggestions to engage with your audience:

- 1) Post on regular basis, at least once a week. Always include rich media such as an image and video to stand out and capture attention.
- 2) The same content can be used for status updates and group posts on the condition that you find different angles.
- 3) Make it all about the followers. Provide interesting and value-added content that can help them to know more about the cloud industry (not only Icertis products) and how to succeed in business. Using the Content Strategy Generator

tool (included in the Tools section of this report) can help to determine the hottest/most relevant topics of the moment. Reading the discussions in Icertis group can help to pick new topics people are more interested in.

4) Customize your message, be empathic. When sending out Announcements always remember to change the LinkedIn automatically generated subject line. When acquiring a new follower always send out a thank you message.

5) Follow other companies and engage with their people. Promote and refer the companies that are important to Icertis business by liking, sharing and commenting on their updates. These companies may also return the favor and help to promote Icertis on LinkedIn as well. Also consider following companies outside of cloud industry that are in the same geographic location.

Example 1, a company in Icertis's network is looking for a qualified candidate to fill a position. Point them to several professionals in your network who might be a good fit.

Example 2, a company posts something that is helpful to Icertis. Thank them for the resource publicly and share it with your connections.

## **Take Action**

Followers are more active when explicitly called to act in some way. Since we have set out two lead generation goals, this strategy will call for two actions – one for each goal:

1) Increase the number of Icertis LinkedIn followers

- Encourage existing employees to connect with the Icertis LinkedIn page. Existing employees can help extend the company's reach by sharing status updates with their connections on LinkedIn.
- Post a "call to action" to follow your page within relevant LinkedIn Groups.
- Invite your followers to share content or post comments. Be explicit using short questions and invite to action (what do you think about... share this...)

## 2) Increase the number of Icertis product demo's downloaded

- In your post or status updates, link to the Icertis website with the invitation to download a demo. To track the success of LinkedIn, be sure to use a link shortening and tracking service like bit.ly. This will help you gauge how effective LinkedIn is for your website through Google Analytics.
- On the website be sure to spotlight the product demo. Ideally, you should place a prominent link to the newest product demo on the home page.

## Icertis Website Recommendations for Going Social

<http://www.icertis.com>

<http://icertis365-web.sharepoint.com/SitePages/index.aspx>

### General Recommendations:

Look at having a two website format, with at least dual English & Indian versions so that content can be pushed to specific regional pages. In the future, if Icertis expands into Asia, Europe and other cultures then you can grow those language versions as well.

Example of a future language pull-down in top menu

-English (NA)

-English (IN)

-English (UK)

-Deutsch

-Español

-Français

-Italiano

-日本語

-Nederlands

-Português

Also in the footer create a Community section listing all your social media. This will appear on all pages of the site for quick and easy access.

Blogs | Twitter| YouTube | Facebook | LinkedIn | +Share

The blog should be hosted as a subdirectory of the site and it should appear as a top-level category in the navigation menu. If you multiple blogs, create a new main category link in the navigation menu with a pull down linking to each of the blogs incorporated into the Icertis framework.

For example:

Blogs

- CEO blog
- Industry blog
- Event blog

## Homepage Recommendations:

At the bottom of the grey box of about us copy, insert a simple "Please follow us" with a group of social media icons linked to the Icertis Twitter, Facebook and LinkedIn pages.

Example: **Follow us on:** 

Use the slide screen and create a sixth banner that announces the Icertis social media channels. This is also a perfect place to promote a CEO Blog, an event on the Facebook page or jobs listings on the company's LinkedIn site, etc. Switch this banner up at least once each month to keep it fresh.

Add a third column for a Twitter feed into the toggle with News and Events. You can also size it to match the others. Setting the Twitter feed to display 3 or 4 tweets would be enough.

## About Us Page Recommendations:

Executive Team page - Add any (work friendly) Twitter handles to the LinkedIn icons/links so that people will follow. Or any other social media that any of the team takes on like a CEO Blog for Samir.

News & Events – Inform visitors to this page that they can find out about news & events on Icertis's Twitter feed and Facebook page. Let them know that you'll be promoting and talking more about conferences or press releases etc.

Add a specific page just for Press Releases.

Cloud Products, Cloud Services, and Industries pages:

Embed a few YouTube videos here and there to talk and explain these Icertis

products and services. This will generate some additional content, keep the visitor engaged and learn even more.

### **Events/Calendar Pages:**

A lot of these industry events have Facebook and Twitter pages that can be followed and promoted to help push and grow the event. Show and link to their Facebook and Twitter pages along with the general event data and website so you can actively try to engage and cross promote in these social networks.

## Summary

Icertis has been successful developing cloud based enterprise solutions for large and medium sized business on the Azure platform. In the past, it has used traditional methods of communication and marketing their brand including face-to-face meetings, web marketing and print ads in different markets. While these are effective ways of creating business leads and promoting brand awareness, we recommend that Icertis begin using social channels to compete more effectively as the marketplace for cloud application developers becomes more crowded and their target audience shifts to a more socially connected IT product evaluator and new markets.

Using the Dragonfly Effect framework, we suggested Icertis use social media to enhance some of their traditional marketing goals – brand awareness and lead generation. At the same time, developing a blog presence and editorial and knowledge content development that can be used to identify Icertis management as thought leaders in the field of cloud computing application development.

The strategy provides recommendations to implement new media including a brand blog, Twitter personas for the brand, the CIO, CTO and the CMO, website improvement and enhanced Facebook and LinkedIn pages. We recommend a stepwise approach to increasing Icertis's presence in the social media arena. At the outset, we recommend setting modest social media reach targets, monitoring using free social monitoring tools and adjusting accordingly as goals are met. Lastly, we recommend that Icertis use an editorial calendar to manage and match social media campaigns with traditional marketing efforts for product launches and trade shows event.

Icertis has delved into some social media markets, but the goals or focus has been unclear. Setting specific micro-goals to build brand awareness and developing metrics to track success, Icertis can decide what level of effort they wish to engage and what their return on their investment is worth. We recommend they implement some of these strategies for short-term campaigns, such as upcoming tradeshow and setting metrics or goals for success to determine if they should increase effort with limited amount of resources and time. Social media campaigns will never replace traditional marketing campaigns, but can enhance

those traditional campaigns and should be considered where there has been little or no effort in the past.

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<http://icertis365web.sharepoint.com/SitePages/Company%20overview.aspx>

LinkedIn Audience in India

[http://marketing.linkedin.com/sites/default/files/pdfs/Infographic\\_LinkedIn\\_Audience\\_IN\\_2012.pdf](http://marketing.linkedin.com/sites/default/files/pdfs/Infographic_LinkedIn_Audience_IN_2012.pdf)

LinkedIn Audience in the US

[http://marketing.linkedin.com/sites/default/files/pdfs/Infographic\\_LinkedIn\\_Audience\\_US\\_2012\\_o.pdf](http://marketing.linkedin.com/sites/default/files/pdfs/Infographic_LinkedIn_Audience_US_2012_o.pdf)

Reach IT Software Buyers with LinkedIn

[http://marketing.linkedin.com/sites/default/files/pdfs/LinkedIn\\_ITSoftware\\_Research2011.pdf](http://marketing.linkedin.com/sites/default/files/pdfs/LinkedIn_ITSoftware_Research2011.pdf)

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Tableau LinkedIn Page, <http://www.linkedin.com/company/tableau-software>

Tableau Twitter Feed, <https://twitter.com/#!/tableau>

Tableau Website, [www.tableausoftware.com](http://www.tableausoftware.com)

The Global LinkedIn Audience

[http://marketing.linkedin.com/sites/default/files/pdfs/Infographic\\_LinkedIn\\_Audience\\_Global\\_2012.pdf](http://marketing.linkedin.com/sites/default/files/pdfs/Infographic_LinkedIn_Audience_Global_2012.pdf)

Top 10 Cloud Influencers, Thought Leaders, Wired Magazine

<http://www.wired.com/cloudline/2012/05/top-10-cloud-influencers/>

Why Starting a LinkedIn Group Will Change Your Business Forever

<http://linkselling.com/why-starting-a-linkedin-group-will-change-your-business-forever/>

# June

# 2012

## Social Media Editorial Calendar

This is an example editorial calendar. Blog/Infographic topics should be shaped around upcoming product release, products to be emphasized at WPC and topic of presentations at WPC.



Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
	<p><b>FB</b> – Add Event header  <b>FB</b> – Create Event entry for WPC Toronto  <b>LI</b> – Join LI Groups  <b>Tweet</b> – Announce WPC Participation</p>	<p><b>Blog</b>  <b>FB</b> – Link to blog  <b>LI</b> – participate in 1 or 2 groups  <b>Tweet</b> – Link to blog</p>	<p><b>FB</b> – post photos from recent Icertis event  <b>LI</b> – participate in 1 or 2 groups  <b>Tweet</b> – 1 select image from posted photos + link to others.</p>	<p><b>Blog</b>  <b>FB</b> – Link to blog  <b>LI</b> – participate in 1 or 2 groups  <b>Tweet</b> – Link to blog</p>	<p><b>FB</b> – Link to interesting Cloud article  <b>LI</b> – participate in 1 or 2 groups  <b>Tweet</b> – Link to interesting Cloud article  <b>Review analytics</b></p>	

8	9	10	11	12	13	14
	<p><b>FB</b> – Update places with participation in TechEd</p> <p><b>LI</b> – participate in 1 or 2 groups</p> <p><b>Tweet</b> – tweet about TechEd</p>	<p><b>Blog</b></p> <p><b>FB</b> – Link to blog</p> <p><b>LI</b> – participate in 1 or 2 groups</p> <p><b>Tweet</b> – Link to blog</p>	<p><b>FB</b> – post photos from TechEd</p> <p><b>LI</b> – participate in 1 or 2 groups</p> <p><b>Tweet</b> – 1 select image from posted photos + link to others.</p>	<p><b>Blog</b></p> <p><b>FB</b> – Link to blog</p> <p><b>LI</b> – participate in 1 or 2 groups</p> <p><b>Tweet</b> – Link to blog</p> <p><b>Tweet</b> – tweet about TechEd</p> <p><b>Tweet</b> – tweet about WPC</p>	<p><b>FB</b> – Link to interesting Cloud article</p> <p><b>LI</b> – participate in 1 or 2 groups</p> <p><b>Tweet</b> – Link to interesting Cloud article</p> <p><b>Review analytics</b></p>	
15	16	17	18	19	20	21
	<p><b>FB</b> – Find related businesses/Clients to like on FB.</p> <p><b>Create Slideshare &amp; Upload 1 slideshow from previous presentation</b></p> <p><b>FB</b> – Link to Slideshow</p> <p><b>Tweet</b> – Tweet out link to slideshare.</p> <p><b>LI</b> – participate in 1 or 2 groups</p>	<p><b>Blog</b></p> <p><b>FB</b> – Link to blog</p> <p><b>LI</b> – participate in 1 or 2 groups</p> <p><b>Tweet</b> – Link to blog</p>	<p><b>Infographic (Post on Blog)</b></p> <p><b>FB</b> – Link to Infographic</p> <p><b>Tweet</b> – Link to Infographic</p> <p><b>LI</b> - Post WPC Participation to groups. Invite people to visit booth/talk</p>	<p><b>Blog</b></p> <p><b>FB</b> – Link to blog</p> <p><b>LI</b> – participate in 1 or 2 groups</p> <p><b>Tweet</b> – Link to blog</p>	<p><b>FB</b> – Link to interesting Cloud article</p> <p><b>LI</b> – participate in 1 or 2 groups</p> <p><b>Tweet</b> – Link to interesting Cloud article</p> <p><b>Review analytics</b></p>	
	<p><b>FB</b> – Post image for WPC Toronto, Link to WPC page and express excitement to participate.</p> <p><b>LI</b> – participate in 1 or 2 groups</p> <p><b>Tweet</b> – Image for WPC &amp; looking forward to participate. Ask who else coming.</p>	<p><b>Blog</b></p> <p><b>FB</b> – Link to blog</p> <p><b>LI</b> – participate in 1 or 2 groups</p> <p><b>Tweet</b> – Link to blog</p>	<p><b>FB</b> – post photos from recent Icertis event</p> <p><b>LI</b> – participate in 1 or 2 groups</p> <p><b>Tweet</b> – 1 select image from posted photos + link to others.</p>	<p><b>Blog</b></p> <p><b>FB</b> – Link to blog</p> <p><b>LI</b> – participate in 1 or 2 groups</p> <p><b>Tweet</b> – Link to blog</p>	<p><b>FB</b> – Link to interesting Cloud article</p> <p><b>LI</b> – participate in 1 or 2 groups</p> <p><b>Tweet</b> – Link to interesting Cloud article</p> <p><b>Major Analytics Review</b></p>	

Additional Notes:

- 1) Do NOT set your blog to automatically post links to Facebook or Twitter. Craft specific Facebook or Twitter posts to link to the blog.
- 2) When possible on Facebook, do not post links or pure text. Upload an image relevant to the posting, add the text as caption and then link. This takes advantage of EdgeRank's prioritization of image/video.
- 3) Always reply to any comments on blog, Facebook or Twitter as quickly as possible.

- 4) Always Thank Twitter/LinkedIn/Blog Follows.
- 5) Tweet, post to Facebook at 10:00 PT to start. Adjust to 11:00 am next month to test for best posting time.
- 5) Each week on Friday, review your analytics to see what posts are popular/trending
- 6) A final analytics review should be conducted at the end of the month, evaluating for best posting times/days/content.

## Appendix A: Cloud Thought Leaders

Simon Crosby (Cloud CTO at Citrix) – <http://twitter.com/simoncrosby>

Stephen Herrod (CTO at VMware) – <http://twitter.com/herrod>

Werner Vogels (CTO at Amazon) – <http://twitter.com/werner>

Jay Fry – <http://twitter.com/jayfry3>

Randy Bias (CEO at Cloudscaling) – <http://twitter.com/RandyBias>

James Staten (Analyst at Forrester) – <http://twitter.com/Staten7>

Vanessa Alvarez (Analyst at Forrester) – <http://twitter.com/VanessaAlvarez1>

Chris Wolf (Analyst at Gartner, formerly with Burton) –  
<http://twitter.com/cswolf>

Carl Brooks (Journalist at [SearchCloudComputing.com](http://SearchCloudComputing.com)) –  
<http://twitter.com/eekeygeeky>

Alex Wied – <http://twitter.com/alexwied>

Alistair Croll – <http://twitter.com/acroll>

Bernard Golden – <http://twitter.com/bernardgolden>

Guy Rosen – <http://twitter.com/guyro>

Dave Roberts (<http://www.focus.com/profiles/dave-roberts/public/>) –  
<http://twitter.com/sandhillstrat>

Andrew Baker (<http://www.focus.com/profiles/andrew-baker/public/>) –  
<http://twitter.com/Logik007>

Michael Dortch (<http://www.focus.com/profiles/michael-dortch/public/>) –  
<http://twitter.com/DortchOnIT>

Simon Wardley – <http://twitter.com/swardley>

Kate Craig-Wood – [http://twitter.com/Memset\\_Kate](http://twitter.com/Memset_Kate)

## **Appendix B: Social Media Tools and Resources**

### **Essential Social Media Channels and Blogging Tools**

Facebook – [www.facebook.com](http://www.facebook.com)

Twitter – [www.twitter.com](http://www.twitter.com)

LinkedIn – [www.linkedin.com](http://www.linkedin.com)

WordPress – [www.wordpress.org](http://www.wordpress.org)

### **Audience Research Tools**

Google Insights – [www.google.com/insights/search](http://www.google.com/insights/search) (free)

Google Trends – [www.google.com/trends](http://www.google.com/trends) (free)

Google Alerts – [www.google.com/alerts](http://www.google.com/alerts) (free)

Topsy – [topsy.com](http://topsy.com) (twitter research, free)

Trendsmap – [trendsmap.com](http://trendsmap.com) (twitter research, free)

Technorati – [technorati.com](http://technorati.com) (blog research, free)

### **Social Media Management & Monitoring Tools**

Hootsuite – [hootsuite.com](http://hootsuite.com) (social media management, free)

Google Analytics – [www.google.com/analytics](http://www.google.com/analytics) (website analytics, free)

Trackur – [www.trackur.com](http://www.trackur.com) (social media monitoring, not-free, offers simple sentiment analysis)

SproutSocial – [sproutsocial.com](http://sproutsocial.com) (social media monitoring, not free)

### **Content Idea Generator Tool**

Content Idea Generator V2 (free)

<https://seogadget.co.uk/content-strategy-generator-tool-v2-update/>

## **Appendix C: Social Media Guidelines and Recommend Practices**

**You're invited to participate.**

**What's your passion? What causes do you support? What do you want to learn more about?** Social media sites are a great place to engage with like-minded people and experts. There are thousands of communities to join online and boundless opportunities to build your own community.

Icertis is at the forefront of business applications in the cloud. Social media offers the opportunity to build awareness about the innovative solutions that we offer as well as to forge relationships and connect with the cloud community and potential customers in new and powerful ways.

You're encouraged to join online networks and conversations. If you haven't already started, **we invite you to participate!**

In the past, customer and employee collaborations have taken place through a variety of communication media including advertising, traditional media outreach, meetings, events, calls and email conversations. In recent years, new online communication technologies have emerged that open the collaboration to a much broader audience than just those who could physically attend a meeting, participate in a call, or be on an email distribution list. Imagine your every email communication now includes the entire state of California on the CC: line. These social media technologies include blogs, podcasts, user forums, social networks, wikis and other communication forms that facilitate community-based collaboration.

These technologies present opportunities to share ideas and better interact with our personal and professional networks. With these opportunities comes responsibility. So like any public communication channel, it's important that we have a set of guidelines that protect our business needs, while letting you participate naturally and thoughtfully.

**In this new age of social media, there's a blurring of personal and professional conversations.** As employees, we need to consider how we impact the Icertis brand whenever we communicate with others. These guidelines are designed to help you understand how to effectively engage in social media both at work and at home.

Given the pace of innovation in social networking and communication tools, this document can't anticipate every conceivable scenario or situation. These are living, dynamic guidelines. The goal here is to establish baseline guidelines and recommendations for how to engage in social media that can evolve as we learn and gain experience together.

## **Guiding Principles**

- **Use common sense.** You're smart. You get it.
- **Be thoughtful about how you present yourself in online social networks.** The lines between public and private, personal and professional can become blurred in online social networks. Remember, if you're talking about Icertis you're expected to disclose that you're an Icertis employee or contractor. (If you'd like to know how to do this, please see the examples under "Identify Yourself" in "Recommended Practices".) By identifying yourself as an Icertis employee, you're now publicly connected to your colleagues, managers, students, customers and prospects.
- **Speak in the first person.** Use your own voice and bring your own personality to the forefront. Only use "I" statements. State your own opinions and make it clear that they aren't those of the company. (For how to do this, see examples under "Use a disclaimer" in "Recommended Practices".) Be personally accountable for what you say.
- **Use good judgment.** *If it gives you pause, pause!* Remember that there are always consequences to what you publish. If you're about to publish something that makes you even the slightest bit uncomfortable, is potentially embarrassing, or may reflect poorly on the Icertis brand, think

twice. ***What you put in cyberspace stays – and is searchable.*** Review the suggestions in this document and think about why you are uncomfortable. If you're still unsure and it's related to Icertis business, please discuss it with your manager or the Marketing Director. Ultimately, however, you're responsible for what you post to your blog or publish in any form of online social media.

- **Remember your day job.** You should make sure your online activities don't interfere with your job, commitment to customers, or commitments to co-workers.

## Recommended Practices

**Conduct yourself professionally** – Social media technologies are simply a way to have conversations through computers rather than in person. It's important for Icertis employees to act no differently using these technologies than they would when representing Icertis in person or through the telephone – other than to realize that ***every conversation online is permanently discoverable.*** It's prudent to review Icertis policies, including the privacy policy, electronic communication policy, nondisclosure agreements and information security policies.

**Identify yourself** – When participating in a professional context related to our industry, our business or our community in these various social networks and online communities, mark all of your contributions with your name – and when relevant – your role at the Icertis. If you make comments about the Icertis such as services it offers, you should always identify yourself and your connection to Icertis.

Here are some examples of how to disclose your connections to the Icertis:

- *Microblogs such as twitter:* #employee or #Iworkthere or #sales or #marketing
- *Facebook:* “I work there” or “This is my company”

**Respect copyright and intellectual property rights** – Because online communities are frequently very open, they encourage a free flow of information. Not only that, the technologies themselves make it very easy to “cut and paste” information between various sources. Icertis employees must understand and respect the rights of others in written work, photographs, audio and visual recordings, trademarks and other forms of intellectual property. If you reference someone else’s original content, it’s a good practice to use HTML hyperlinks to connect with that content.

**Respect Icertis confidentiality** – Business confidential information must remain confidential. Don’t publish or comment on the Icertis’s clients’, students’, vendors’ or affiliates’ confidential or proprietary information. Keep in mind, *things you may believe to be general knowledge might not be general knowledge*. You need to guard against sharing information that could help the competition. Information regarding business-related activities, such as the location, time, participants and matters discussed at business meetings, isn’t appropriate for general distribution. If you have any questions on what might or might not be appropriate for sharing with the community, check with your manager.

**Acknowledge your sources** – when you cite a source or quote another person in a post, credit them either with a link to the information online or using their online handle.

**Respect those in the community** – Social media technologies allow fast communications from different perspectives. Sometimes, it’s easy for such passionate conversations to turn into “flame wars”. The Icertis policies against discrimination and harassment are consistent with the expectation that members of these online communities will be treated with respect. Obscenity, ethnic slurs, or personal attacks have no place in social media. If you must disagree, do so respectfully.

**Respect others’ content** – because of the “read/write” nature of the Web, it’s possible for people to cause mischief on websites such as a wiki. Although it may be tempting to use the anonymity of the web to make false claims, any such

employee actions are strictly prohibited. If you have any questions on what might or might not be appropriate for a specific edit, ask your manager.

**Fix mistakes first** – Social media technologies enable dialog that happens in real time, but it’s shared forever. Sometimes, even due to circumstances beyond our control, we may be mistaken about the facts, opinions may be understood, or opinions may change. It’s important for Icertis employees to recognize these realities. Therefore, *if you make a mistake, be the first one to correct it*. Also, if you must alter a post, indicate that you’ve done so. One of the more common methods is “lining out” text that is stricken from your post.

**Be an interesting expert** – The power of social media communities is that they can focus on niches. Therefore, it’s important to have expertise in your field. Write interesting posts and/or comments, be relevant, add value, offer insights and stay on topic. Don’t comment on areas that you aren’t an expert in. Leave that for others in Icertis who are experts.

**Consider accuracy** – Before you hit “send”, check your facts, check any links you’ve included and check your spelling.

**Use discretion** – Sometimes, conversations occur that clearly involve Icertis customers or are about the Icertis. This is your opportunity to be an active listener. If the conversation warrants a direct or official response from the Icertis, please forward a link to that conversation to your supervisor. This helps us to be consistent and timely in our responses and allows us to find the right person to respond. Sometimes the problem or misunderstanding is something we’re not aware of, and we can resolve at the root level.

**Use a disclaimer** – Official Icertis Institution communications come from authorized Icertis communications personnel. Recognize and avoid situations where the public might consider an employee’s post to be official company communications rather than expressions of personal opinion. When an association between you and Icertis can be perceived, make it clear that your views are your own and not necessarily those of the company. Do that with a simple disclaimer.

Here are examples of disclaimers:

- *Blog or website:* ‘The postings on this site are my own and don’t represent the positions, strategies or opinions of my employer, Icertis.’
- *Microblog such as Twitter:* #employee or #Iworkthere.
- *Facebook:* Fill in “Employer” field in your profile with “Icertis”. Posts in which you mention Icertis say, “I work there” or “this is my company”.

**Personas and Identities** – Issues of personal privacy, company risk, and disclosure can create a complex set of issues when participating online. With that in mind, we’ve created the following guidelines regarding developing and managing online personas/identities:

- “Icertis” and “Applying Cloud Where it Matters” are protected service marks. Likewise other words or phrases that may be similar to Icertis branding should NOT be used in the creation of external sites, online identities or web pages.
- Use good judgment based on your role and/or job function. Realize that blending your personal identity and your professional role in social channels could have either unforeseen business consequences or remarkable advantages. Regardless of how you choose to position yourself online, please do it with care.
- “Portability” is a key issue to consider – when creating a professional/personal online identity, ensure you consider what happens to that identity and content if your job, role or functional changes.
- Authorized Icertis employees who use an approved online identity (e.g. @Icertis) are required to publicly disclose their name and Icertis role on the associated Web page.

If you have any questions about this, please discuss them with your supervisor or manager to gain clarification.

## Overall Social Media Tone and Personality

Remember that social media is a first-person medium. Here are some best practices for online tone:

1. **Be polite** – Talk the way you would if you were in a job interview.
2. **Be courteous** – Be sure to listen and ask questions.
3. **Be helpful** – Offering tips and how-to's goes a long way.
4. **Be conversational** – Chat as you would with a stranger or in other social settings, avoiding jargon.
5. **Be intelligent** – Provide value. Offer insight. But don't talk down.
6. **Be non-confrontational** – Do your best to avoid online controversy. If you see something contentious that requires attention, alert the Icertis Marketing Director.
7. **Be transparent** – Disclose that you work for the Icertis. Be honest and truthful.
8. **Listen** – Do your best to spend more time listening to what others are saying than you spend talking.

## The Fine Print

These guidelines apply to all employees and agents operating on behalf of all Icertis related entities.

These guidelines are intended to support any and all other existing Icertis policies. They don't replace them. For further information please consult:

<Insert other Icertis policies on privacy, electronic communications, nondisclosure agreements, employee handbook.>