Special Report

CMO Perspectives on Social Marketing ROI
A strategy for monetizing social media marketing and measuring ROI

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INTRODUCTION TO SOCIAL MEDIA MONETIZATION

A STRATEGY FOR MONETIZING SOCIAL MEDIA MARKETING AND MEASURING ROI

Social media continues to have a profound effect on marketing, and the use of this channel for marketing purposes is rapidly evolving. Last year, our research revealed how social media marketing was maturing, resulting in a clear shift from tactical to strategic thinking.

In our 2011 social media marketing benchmark study, we found that many organizations in the Strategic phase of social marketing maturity are monetizing this channel. The CMOs in these organizations are not only promising ROI, they’re delivering it.

This report examines how CMOs are overcoming the challenge of social media monetization, their perception of social marketing’s ability to produce ROI, and how they are measuring it.

For the purpose of this report, we define a CMO as the chief marketing officer, or senior executive with final marketing decision-making authority for their organization. We thank the 760 CMOs who shared their valuable time and insights about social marketing in our third annual social marketing benchmark study. Their participation is proving to be enormously useful to the marketing community.

Measuring the financial ROI of social media requires considerable discipline, strategies, procedures and a dedicated management system to track and capture the required cost and value information. While this report will focus on a strategy for monetizing this channel, we acknowledge that social media delivers many immeasurable benefits. Successful social marketing must align with all corporate and branding objectives, not just ROI.

CMO PRIORITIES HAVE CHANGED — NOW IT’S “SHOW ME THE MONEY”

Among the top priorities of CMOs are measurable factors directly related to the monetization of social media efforts in 2011. These include:

- Achieving or increasing measurable ROI from social marketing programs
- Converting social media members, followers, etc., into paying customers
- Achieving or increasing measurable lead generation from social marketing programs
- Improving the cost efficiency of customer support programs

Whether an organization is thinking tactically or strategically about social marketing will determine how high these monetization factors rank in priority. For example, twice as many CMOs in the Strategic phase of social marketing maturity rank “achieving or increasing measurable ROI from social marketing programs” a top priority for 2011 than CMOs in the Trial phase. One explanation for this difference is that Strategic phase social marketers are much more likely to already have the monetization of this channel underway.
As the following chart shows, monetization factors are not the only top-of-mind priorities for CMOs. Websites have become the hub of the marketing strategy for most organizations, which is why the number one strategic priority for CMOs is increasing website traffic through social media integration. Branding factors, such as improving awareness and reputation, also remain top priorities in 2011.

Q. As CMO or the senior marketing executive in your organization, what are your top strategic priorities for social media marketing in 2011?

Chart: Top strategic priorities for social media marketing in 2011

<table>
<thead>
<tr>
<th>Priority</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increasing website traffic through social media integration</td>
<td>71%</td>
</tr>
<tr>
<td>Improving brand awareness or reputation</td>
<td>66%</td>
</tr>
<tr>
<td>Converting social media members, followers, etc. into paying customers</td>
<td>63%</td>
</tr>
<tr>
<td>Developing an effective and methodical social marketing strategy</td>
<td>53%</td>
</tr>
<tr>
<td>Improving search engine ranking positions</td>
<td>50%</td>
</tr>
<tr>
<td>Achieving or increasing measureable ROI from social marketing programs</td>
<td>46%</td>
</tr>
<tr>
<td>Achieving or increasing measureable lead generation from social marketing</td>
<td>43%</td>
</tr>
<tr>
<td>Integrating social marketing data with CRM and other marketing systems</td>
<td>21%</td>
</tr>
<tr>
<td>Integrating social media monitoring and analytics into a single dashboard</td>
<td>11%</td>
</tr>
<tr>
<td>Improving the quality and cost efficiency of customer support programs</td>
<td>9%</td>
</tr>
<tr>
<td>Recruiting interdepartmental staff to perform social marketing activities</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: ©2011 MarketingSherpa Social Marketing Benchmark Survey
Methodology: Fielded February 2011, N=760 CMOs

Social marketing return on investment is a measure of the financial value returned from each dollar invested in this channel. This chart also puts a spotlight on an often overlooked financial value – improving the cost efficiency of customer support programs. Using social media to enable customer “self-service” will significantly reduce associated costs, which increases financial value. Yet, on average, only about one in ten organizations consider this a priority.
While every organization would like to convert social media members, followers, etc. into paying customers, CMOs in the B2B marketing space have a long and complex sales cycle to consider. For many, this makes direct conversion an unrealistic priority.

B2B marketers find that generating leads from social media is a more realistic strategic priority than converting their social constituents into customers. This is primarily due to the previously mentioned long and complex B2B sales cycles. This is opposed to those marketing directly to consumers, who place a much higher priority on converting a visitor into a paying customer. Retailer or e-commerce websites are inherently capable of real-time product selection and purchase, enabling visitors referred from social sites to convert to a paying customer.

One strategic priority that varies in importance based on the size of an organization is the integration of social marketing data with CRM and other marketing systems. This may be due to the greater need for CRM and other automated marketing systems by larger organizations.

**THE IMPORTANCE OF SOCIAL MARKETING MATURITY**

Social media marketing is a time-intensive practice that requires the contributions of numerous employees from various departments within an organization. The more people involved, the greater the need for a formal process with thorough guidelines to manage their efforts.

In this report, we have segmented some of the benchmark data by the following three phases of “social marketing maturity.” The process an organization uses to plan, execute and measure the performance of social marketing programs determines its phase of social marketing maturity. The goal of this segmentation is to demonstrate the disparity in the performance of social marketing programs by each phase of maturity.

<table>
<thead>
<tr>
<th>Three Phases of Social Marketing Maturity</th>
<th>Trial Phase</th>
<th>Transition Phase</th>
<th>Strategic Phase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization does not have a process or guidelines for performing social marketing.</td>
<td>Organization has an informal process with a few guidelines it sporadically performs.</td>
<td>Organization has a formal process with thorough guidelines it routinely performs.</td>
<td></td>
</tr>
</tbody>
</table>

Advancing from one phase of social marketing maturity to the next has an important effect, not only on effectiveness, but also in how an organization executes its program. We found that organizations in the Trial phase were technology oriented, setting up their social marketing platforms before they had a plan or a purpose for them. As marketers advanced through the phases, they would start by developing a sound strategy with a plan and a purpose for every platform before implementing them.

“Internally, we have had to go through a significant adaptation process in explaining the value proposition of social media and propagating it throughout the organization. We have about 95 percent adoption with staff. The push back has been on the "time and intellectual" investment that needs to be made to insert work-related "relevant" messages into the daily routine by team members. They are much more apt to push personal messages than work messages.” —CMO insight

In the following chart, 35 percent of CMOs say their organization is still in the Trial phase of social marketing maturity, while 19 percent have reached the Strategic phase and use a formal process with thorough
guidelines they routinely perform to optimize effectiveness. The remaining organizations are in transition between the Trial and Strategic phases.

Chart: Organizations transitioning from Trial to Strategic phase of social marketing maturity

Organizations marketing to both businesses and consumers, whether separately or synchronously, have a more complicated channel scenario. To manage this complexity, these B2B2C marketers are more likely to have a formal, routinely performed process with thorough guidelines.

There are good reasons for some industry sectors to lag behind other industries when it comes to advancing from the Trial to Transition phase of social marketing maturity. Social marketing benefits from the transparent sharing of information. Organizations in sectors such as healthcare, professional or financial services face complex legal issues or industry ethics that may hinder necessary sharing of information.

The size of an organization relates to its phase of social marketing maturity. Large organizations with more than 1,000 employees are more than twice as likely as small organizations with fewer than 100 employees to have reached the Strategic phase.

PERCEPTION IS DRIVING INVESTMENT IN SOCIAL MEDIA MARKETING PROGRAMS

When it comes to convincing the skeptics who control the budgets, perception is everything. Fortunately, the misconception that social media marketing is unlikely to produce ROI is vanishing. For 62 percent of organizations, the opinion is that social marketing is a promising tactic that will eventually produce ROI. Driven by this perception, these organizations are investing in their social marketing budgets, albeit conservatively.

For 20 percent of organizations, social marketing ROI is a reality and investment in this channel will continue. In the sections ahead, we will reveal the yardsticks CMOs use to measure both the return and the investment in their social marketing programs.
Q. Which statement best describes how you perceive social marketing’s ability to produce a return on investment (ROI) at budget time?

**Chart: CMO perception of social marketing ROI, by social marketing maturity**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strategic</th>
<th>Transition</th>
<th>Trial</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social marketing is producing a measurable ROI. Let’s continue to invest in this tactic.</td>
<td>47%</td>
<td>17%</td>
<td>11%</td>
</tr>
<tr>
<td>Social marketing is a promising tactic that will eventually produce ROI. Let’s invest but do it conservatively.</td>
<td>46%</td>
<td>70%</td>
<td>60%</td>
</tr>
<tr>
<td>Social marketing is unlikely to produce ROI. Why invest more?</td>
<td>2%</td>
<td>1%</td>
<td>5%</td>
</tr>
<tr>
<td>Social marketing is basically free. Let’s keep it that way.</td>
<td>5%</td>
<td>11%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Source: ©2011 MarketingSherpa Social Marketing Benchmark Survey
Methodology: Fielded February 2011, N=760 CMOs

Use of a formal, routinely performed process with thorough guidelines is what distinguishes an organization in the Strategic phase of social marketing maturity from the rest. As this chart shows, organizations in the Strategic phase are more than four times as likely to produce measurable ROI – the most important performance indicator to a CMO.

For 70 percent of organizations in the Transition phase and 60 percent in the Trial phase, social marketing ROI is not yet a reality but the promise is strong enough to drive investment.

“Today it is perceived to have little value because 2011 is the first year we have launched a comprehensive campaign. We have little to show for our efforts so far. However, senior leadership in the organization sees the potential and is willing to invest over the next 3-5 years to determine the real value.” –CMO insight

On average, 15 percent of CMOs think social marketing is free and wish to keep it that way. When we segment this group by primary channel, we find that B2B marketers are, by far, the least likely to believe this misconception. Social marketing is a time consuming practice that requires significant staff commitment for effective execution.
Q. At what rate do you expect your expenditures on social marketing to change from 2010 to 2011?

Chart: Three-quarters of CMOs will continue increasing social marketing investment in 2011

More than two-thirds of organizations are increasing their social marketing expenditures in 2011, and half of those are increasing the budget by at least 20 percent. While an insignificant percentage plan to decrease the budget, 22 percent are making no change from last year. Among the chief concerns for not increasing social marketing budgets are the following:

- Determining where the budget should come from
- Inability to track the success of social media
- Uncertainty about the return on investment
- How to reallocate the required human resources

THE PROMISE OF SOCIAL MARKETING ROI IS NOW A REALITY

Social marketing ROI is a measure of the financial value returned from each dollar invested in this channel. When ROI equals a positive percentage, the social marketing program is earning more than it is costing. Proving ROI is a top priority for CMOs in 2011.

The overall average ROI reported by CMOs who are measuring it is 95 percent.
Q. What is the average return on investment (percent ROI) from your social marketing programs?

Chart: Most frequently reported percentages of social marketing ROI

According to this chart, one-quarter of organizations have achieved a 100 percent return on their social marketing investment. Twelve percent of CMOs reported a 200 percent ROI and an additional two percent of CMOs reported 1,000 percent ROI.

This is tremendous progress for a practice that many organizations consider unlikely to produce a return on investment.

“I find this whole talk of ROI rather amusing. The measurements used are mostly old media. The impact of social media extends beyond simple cause and effect because it is in a network. Once you are in a network, there is often no distinction between marketing, customer support or corporate social responsibility.” –CMO insight

However, for CMOs who have implemented a strategy for monetizing social media marketing and measuring ROI, the results are clear:

“We are thrilled with our social marketing efforts. We have increased sales by an average of 27 percent over last year at a cost increase of less than one percent.” –CMO insight
CASE BRIEFING: SOCIAL MEDIA, VIDEOS AND CONTEST INCREASE REVENUE 114%

Abridged Case Study ID: 31698
Location: MarketingSherpa Member Library
Summary: How Regus, a temporary office space provider, designed an edgier marketing strategy to counter their image as a high-cost, unattainable solution for New York City startups and entrepreneurs.

CHALLENGE

Having a high-end, prestigious brand is usually a good thing – unless that image is preventing you from attracting certain desirable prospects. The Regus marketing team was tasked with developing priority campaigns to boost revenue and occupancy in a handful of specific markets, including Manhattan.

CAMPAIGN

The team focused its lead-generation campaign on startups, entrepreneurs and small or sole proprietor consultants. Connecting with these smaller, "scrappier" companies required new messaging delivered through new media. The integrated campaign included:

- A sweepstakes
- Viral videos
- Social media outreach
- In-person events

The team created a sweepstakes as one of the anchor elements of the campaign. The contest offered one year of rent-free, furnished office space in a Regus building in NYC.

Another anchor element of the campaign was a series of online videos that positioned Regus as an option for small, startup companies. The three videos offered a lighthearted take on the problems entrepreneurs and startups face when trying to conduct business without a permanent office.

The team incorporated social media as a key channel to spread word about the sweepstakes and videos – and to engage with their entrepreneurial prospect base. They created new accounts and developed specific communication strategies for the following social networks:

- Facebook
- Twitter
- LinkedIn

The team also participated in old fashioned, in-person networking with its target audience by sponsoring nine business events in New York City. Rather than hosting the events themselves, the team partnered with established small business organizations in the city.

RESULTS

- Overall 30% increase in lead flow, spiking to 60% during the height of the 90-day campaign
- 33% conversion on leads generated through their Web page, compared to 12% in the prior year
- 114% increase in revenue generated, compared to the same period in the prior year
Calculating the ROI of Social Media Marketing

Metrics that Matter Most for Calculating ROI

We have already established that ROI is a measure of financial value returned on every dollar invested. However, tracking the right metrics for determining the financial values and costs of social media marketing can be a challenge. Initially, marketers avoided this challenge by redefining the acronym to mean Return on Engagement, Return on Innovation, etc. These non-financial measures mean nothing to the C-suite.

When it comes to calculating ROI from social marketing campaigns and programs, some metrics matter more than others do. There is an infinite variety of qualitative, non-financial metrics that can be measured. Today’s analytics solutions offer the ability to measure just about everything – relevant to ROI or not. There are also many financial metrics that should be measured. Unfortunately, it is difficult (if not impossible) to connect every social marketing tactic to a financial return.

“Around ten percent of our social media activity directly translates to bottom-line results, making ROI easy to determine for that portion. However, 90 percent of the work has to do with people building their reputation online and helping others, so they can effectively promote the brand online. That big chunk of work is impossible to measure in terms of ROI.” –CMO insight

The good news is metrics that can and should be measured overlap. Where they overlap, as this diagram shows, are the metrics that matter most for calculating social media marketing ROI.

Values CMOs use to calculate Return

Organizations use different types of financial values to calculate the return portion of ROI. Most are estimated values because it is often difficult, if not impossible, to track a transaction backwards and logically attribute it to single point of origin in a multichannel, multi-touch marketing strategy. For example, B2B marketers rely on the estimated value of qualified leads generated by social marketing programs to calculate ROI more than do marketers in the B2C channel.

However, not all financial values used to calculate ROI are estimates. The most frequently included value in ROI calculations is the actual value of sales generated by social marketing programs. Organizations in the consumer retail or e-commerce sector have the capability, more often than not, to convert website visitors.
into paying customers, and track these customers back to the referring social sites. Therefore, the most frequently used values by this sector are the actual value of sales generated and the estimated value of increased website traffic from social marketing programs.

Q. Which of the following VALUES does your organization include when calculating the RETURN on social marketing investments?

<table>
<thead>
<tr>
<th>Chart: Values used to calculate social marketing ROI, by social marketing maturity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual value of sales generated by social marketing programs</td>
</tr>
<tr>
<td>Estimated value of new leads generated by social marketing programs</td>
</tr>
<tr>
<td>Estimated value of quantitative social metrics like number of fans, followers and subscribers</td>
</tr>
<tr>
<td>Estimated value of increased website traffic from social marketing programs</td>
</tr>
<tr>
<td>Estimated value of qualitative social metrics like brand sentiment and awareness</td>
</tr>
<tr>
<td>Reduced cost of customer support and customer acquisition due to social marketing programs</td>
</tr>
<tr>
<td>Other values</td>
</tr>
</tbody>
</table>

As this chart shows, CMOs whose organizations are in the Strategic phase of social marketing maturity recognize that producing financial value is not only about increasing income, it is also about reducing costs. These CMOs are twice as likely as organizations in the Trial and Transition phases to include the reduced cost of customer support and customer acquisition due to social marketing programs in ROI calculations.


**Costs CMOs Use to Calculate Investment**

The investment side of the ROI equation relates to the costs associated with social marketing programs.

Q. Which of the following costs does your organization include when calculating the investment made in social marketing programs?

**Chart: Costs used to calculate ROI, by social marketing maturity**

<table>
<thead>
<tr>
<th>Cost</th>
<th>Strategic</th>
<th>Transition</th>
<th>Trial</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing staff allocated to social marketing programs</td>
<td>82%</td>
<td>56%</td>
<td>41%</td>
<td>69%</td>
</tr>
<tr>
<td>Advertising on social media sites</td>
<td>53%</td>
<td>44%</td>
<td>41%</td>
<td>53%</td>
</tr>
<tr>
<td>Implementation and/or licensing of social media apps</td>
<td>37%</td>
<td>32%</td>
<td>27%</td>
<td>32%</td>
</tr>
<tr>
<td>Non-marketing staff allocated to social marketing programs</td>
<td>29%</td>
<td>27%</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>Social marketing agency or consultant fees</td>
<td>27%</td>
<td>30%</td>
<td>28%</td>
<td>27%</td>
</tr>
<tr>
<td>Outsourced content created for social marketing programs</td>
<td>23%</td>
<td>23%</td>
<td>28%</td>
<td>23%</td>
</tr>
<tr>
<td>Other costs</td>
<td>3%</td>
<td>5%</td>
<td>10%</td>
<td>5%</td>
</tr>
</tbody>
</table>

In this chart, there is one clear distinction between organizations in different phases of social marketing maturity. The more advanced an organization’s phase of maturity, the more likely it is to include the cost of marketing staff allocated to social marketing programs when calculating ROI. Strategic phase marketers understand what drives value in social media – people who spend time taking an active role in engaging social constituencies – and they are willing to pay for it.
Social marketing falls into two media categories – earned and paid. Earned media is most often the result of staff efforts to engage fans and followers on social sites. Paid media is most often the result of advertising on social media sites. Social platforms use member profile information, preferences and behaviors to target ads with extreme precision, making social site advertising highly efficient when strategically planned.

Organizations marketing to consumers spend a larger share of their social marketing budgets on advertising. That is why as many CMOs marketing through to the B2C channel include the cost of advertising on social media sites in ROI calculations as they do the cost of marketing staff allocated to social marketing programs.

**CALCULATING RETURN ON INVESTMENT FOR THE C-SUITE**

The senior executives who occupy the C-suite and control the budgets know what ROI is and how to calculate it for their management purposes. The best way to win over the skeptics who control the budget is to speak about ROI in their language using a formula they trust.

**FORMULA: \( \frac{\text{Value gained from investment} - \text{Cost of investment}}{\text{Cost of investment}} = \text{ROI} \)

**EXAMPLE: CALCULATING ROI FOR A CAMPAIGN**

Situation: B2B lead generation campaign using social media marketing tactics.

Value: 500 qualified leads generated by social media marketing campaign at an estimated value of $150 per qualified lead for a total return of $75,000.

Cost: Marketing staff time allocated to campaign and outsourced content created for campaign for a total cost of $15,000.

\( \frac{($75k - $15k)}{15k} = 400\% \text{ ROI} \)
RECOMMENDED ACTIONS

MAPPING A STRATEGY FOR MONETIZING SOCIAL MEDIA MARKETING AND MEASURING ROI

The development of an effective strategy for monetizing social media and measuring ROI is a significant obstacle to the successful adoption of social marketing. Seeing the need for a practical method to overcome this obstacle, MarketingSherpa created the Social Marketing ROAD Map. Using this methodology to develop a strategy gives marketers the ability to make winning decisions about social media for marketing purposes.

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 also an opportunity to assess your organization’s existing resources, communities and digital assets that may add value to your strategy.

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 within 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 such as 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 (Devices) that effectively fit 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.
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