Social Marketing ROAD Map Handbook

A method for mapping an effective social strategy

Note: This is an authorized excerpt from the full MarketingSherpa Social Marketing ROAD Map Handbook. To download the entire Report, go to: http://www.sherpastore.com/SocialROADmapHandbook.html or call 877-895-1717
Social Marketing
ROAD Map Handbook
A method for mapping an effective social media strategy

Lead Author
Sergio Balegno, Research Director

Contributors
Sean Donahue, Editor
Jen Doyle, Research Analyst
Adam Sutton, Reporter

Production Editor
Brad Bortone, Editorial Production Manager
# Table of Contents

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

Worksheet: repurposing existing content for social marketing use

Case study: Target audience survey “enables” Microsoft campaign

Example: Microsoft’s I Am Enabled Microsite Homepage

Case study: Researching target audience behavior while they research you

Example: Caturano’s Rapid Assessment Offer

Example: Caturano’s Link Page

Example: Caturano’s Thought Leadership Post

Chapter 1 notes

Chapter 2: ROAD Map – Objectives

Aligning objectives with target audiences and metrics

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

Defining targeted and measurable objectives for social marketing Purposes

The difference between marketing communications goals and social marketing objectives

Example of social marketing objectives hierarchy by marketing communications goals

Prioritize objectives by effectiveness or impact?

Chart: Objectives that social marketing programs achieve effectively

How to align objectives with target audiences and metrics

Aligning objectives with target audiences

Aligning objectives with success metrics

Metrics that matter in social media

Worksheet: Aligning social marketing objectives with target audiences and metrics

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

Example: Creative Sample from Ines Hegedus-Garcia

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

Example: California State Parks Foundation Facebook Page

Chapter 2 notes

Chapter 3: ROAD Map – Actions

Creating a social marketing strategy with a tactical plan of action

Tactical effectiveness versus “fast and easy” implementation

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

Tactics for the effective use of social media platforms

Guiding principles

Blogging

Micro-blogging

Social networking

Multimedia content sharing

Video
Images ......................................................................................................................................... 54
Audio ......................................................................................................................................... 54
Slides ......................................................................................................................................... 54
Other platforms .......................................................................................................................... 55
  Bookmarking .......................................................................................................................... 55
  Social news sites ...................................................................................................................... 55
  Forums ...................................................................................................................................... 55
  Wikis ......................................................................................................................................... 55
Engaging the social minority and pitching the social authority .................................................. 56
The importance of a social media policy and how to draft one .................................................. 57
Budgets and timetables ............................................................................................................. 58
Special Report: Six lessons on developing your social marketing tactical plan ......................... 59
Case study: How to use Twitter to push your products ............................................................. 63
  Example: Woot’s Twitter Feed ............................................................................................... 64
Case study: Economic stimulus package lands 7,000 new customers ...................................... 67
  Example: Atlassian Promotion Sign-Up Page ....................................................................... 67
Integrating social media with other tactics in the marketing mix .............................................. 70
  The ease and importance of social integration ...................................................................... 70
  Chart: Organizations that are integrating social media with other marketing tactics .......... 70
Inbound marketing’s powerful pair – search and social ............................................................. 71
  Who is using social media with SEO? .................................................................................... 71
  Chart: Organizations Integrating Social Media into Search Engine Marketing Campaigns ...... 71
  Why are they doing it? Perceptions of search and social media’s objectives ......................... 72
  Chart: The Effectiveness of SEO Objectives and Social Media Objectives ............................. 72
  The hidden benefits of integrating social media with search practices ................................... 73
  Chart: Average Target Keyword Rankings by Social Media Use .......................................... 73
  Chart: Organic Conversion Rates by Social Media Use ....................................................... 74
  Chart: PPC Conversion Rates by Social Media Use ............................................................ 75
  Perception is not always reality. Social media’s truly effective objectives ............................. 76
  Special report: Part 1 – Five key trends in search and social integration ............................... 77
  Special report: Part 2 – Seven tactics to build rankings using search and social .................... 81
  Case study: Eight steps to create a team-authored blog and reap SEO gains ......................... 85
  Example: Acoustics By Design Blog ...................................................................................... 89
Social sharing extends the reach of email campaigns and more .............................................. 90
  Formulating a strategy for social sharing .............................................................................. 90
  Chart: Plans to integrate social media with email campaigns this year ................................. 90
  Social sharing effectiveness .................................................................................................... 91
  Chart: The effectiveness of social sharing at achieving email marketing objectives ............ 91
  Why email needs social media .............................................................................................. 92
  Chart: Social sharing leads year-over-year change in email list growth tactics ................... 92
  ...and why social media needs email .................................................................................. 92
Example: Sourcing content from Cisco Collaboration blog ....................................................... 127

Worksheet: Constructing your social marketing architecture ..................................................... 128

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

Chapter 4 notes .......................................................................................................................... 132

The Final Chapter ..................................................................................................................... 134
DIRECTOR’S NOTE

ON THE ROAD TO SOCIAL MARKETING MATURITY

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

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

MarketingSherpa’s Social Marketing ROAD Map was created to fulfill this need.

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

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

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

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

Regards,

Sergio Balegno, Research Director, MarketingSherpa
@sergioBalegno
SETTING THE STAGE FOR SOCIAL MARKETING

THREE QUESTIONS TO ASK YOURSELF BEFORE GETTING STARTED

1. WHERE ARE YOU NOW?

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

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

Worksheet: Determining Your Organization’s Phase of Social Marketing Maturity

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Gather intelligence on target audiences,</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>social media use and competition</td>
<td>1</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Define objectives aligned with target</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>audiences and social metrics</td>
<td>1</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Create a social marketing strategy with a</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>tactical plan of action</td>
<td>1</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Select platforms that fit social marketing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>architecture and tactics</td>
<td>1</td>
<td>3</td>
<td>5</td>
</tr>
</tbody>
</table>

Sub-Totals

Total

Social Marketing Maturity

| Trial Phase: 4-6 | Transition Phase: 8-18 | Strategic Phase: 18-20 |

Note: If necessary, skip ahead to “The Social Marketing ROAD Map Defined” for a more detailed description of the four factors critical to social marketing success.
HOW YOUR ORGANIZATION STACKS UP AGAINST OTHERS
Once you have completed the worksheet, you will know where you are in the social marketing maturity lifecycle. But it is also important to understand how your organization stacks up against others. Are you lagging behind or taking the lead? The following chart shows the average percentage of organizations in each phase of social marketing maturity based on a survey of more than 2300 marketers.

**Chart: Organizations by phase of social marketing maturity**

<table>
<thead>
<tr>
<th>Phase</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trial Phase</td>
<td>33%</td>
</tr>
<tr>
<td>Transition</td>
<td>40%</td>
</tr>
<tr>
<td>Strategic</td>
<td>23%</td>
</tr>
</tbody>
</table>

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

2. WHERE DO YOU WANT TO BE?

**ARTICULATING A VISION FOR SOCIAL MARKETING SUCCESS**
Leading a successful initiative starts with a vision – in this case, a vision for social media marketing success.

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

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

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

For example, the vision for an online publisher’s social marketing initiative might look something like this:
Example: A Vision for Social Marketing Success

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

3. How will you get there from here?

Understanding the challenges

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

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

- Getting target audiences to engage and participate
- Finding the time to perform social media programs
- Converting followers, fans, etc. into paying customers
- Lack of an effective social media marketing strategy
- Measuring and proving the ROI of social media programs
- Getting the budget and resources social media deserves
- Finding experienced and proficient social media marketers
- Management resistance to sharing information online

Source / Methodology: MarketingSherpa Social Media Marketing Benchmark Survey / Fielded Nov 2009, N=2,317
A financial commitment to overcome challenges and achieve social marketing success

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

Chart: How organizations perceive social media marketing at budget time

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

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

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

A METHOD FOR MAPPING AN EFFECTIVE SOCIAL MEDIA STRATEGY

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

Social Marketing ROAD Map

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

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

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.

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

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

THE SOCIAL MARKETING ROAD MAP CYCLE

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

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

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

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

Let’s get started!

The stage is set and you’re ready to get started. The following four chapters of this handbook are designed to provide a step-by-step methodology for mapping your social marketing strategy. This strategy will be the compass that guides you through the unfamiliar terrain ahead to social marketing success. Good luck!
Special Pre-Launch Discount: Save $100 + Free Bonus Gift
(Release Date: First week of June)

1st Edition Includes:
• 27 real-world examples of what works
• 11 case studies from leading companies
• 20 charts and tables
• 3 special reports
• 9 checklists and worksheets

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

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

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

Then mail my printed copy to:

Name ____________________________ Title ______________________
Organization ______________________
Address __________________________
City __________________ State/Prov ______ Country __ Zip/Postal ______
Phone (in case of questions) __________

Charge my: □ MasterCard □ Visa □ AMEX
Card# __________________ Exp. Date __________

Print Cardholder Name __________________________
Signature __________________________

OR □ Bill Me* □ Check Enclosed to MarketingSherpa LLC

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

Fax form to: (401) 247-1255